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Collaboration through Education? Transnational Competence and Trade Unions' Cross-Border Commitment

written by

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The thesis is submitted to University College Dublin in fulfilment of the requirements for the degree of *Doctor of Philosophy* in the

School of Business

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TABLE OF CONTENTS

Abstract	vii
----------------	-----

INTRODUCTION

1. Chapter: Introduction	1
---------------------------------------	----------

PART I – MAPPING THE CHALLENGES

2. Chapter: Transnational Labour Collaboration between Bust and Boost	8
2.1. Cross-border Labour Competition.....	9
2.2. Political Support and Union Busting.....	11
2.3. Resources.....	12
2.3.1. Material Resources	13
2.3.2. Human Resources	14
2.3.3. Social-organisational Resources	15
2.3.4. Moral Resources.....	16
2.3.5. Cultural Resources	17
2.4. People.....	25
2.4.1. Individual Commitment.....	26
2.4.2. Perception/Composition of Self	40
2.4.3. Perception of Others.....	48
Conclusion.....	55

PART II – ANALYTICAL FRAMEWORK

3. Chapter: Trade Union Education in Theory	58
3.1. Education: a Right, an Industry and Several Philosophies.....	59
3.1.1. Etymological Foundations of Education.....	61
3.1.2. Philosophical Frameworks of Education	61

3.2.	Trade Union Education.....	67
3.2.1.	Conceptual Considerations	67
3.2.2.	Purposes	70
3.2.3.	Course Programmes and Learning Structure	72
3.2.4.	Transnational Trade Union Education	73
3.3.	Challenges to Trade Union Education	74
3.3.1.	Different Unions, Different Purposes	74
3.3.2.	Different Types of Pedagogical Approaches	75
3.3.3.	Resources.....	82
3.3.4.	People.....	83
	Conclusion.....	88
4.	Chapter: Transnational Competence	94
4.1.	Definition.....	95
4.2.	Origin.....	95
4.3.	Qualities: Relative, Contextual and Holistic	98
4.3.1.	Relative	98
4.3.2.	Contextual.....	101
4.3.3.	Holistic.....	103
4.4.	Limitation: Functionalist-Instrumentalist View	105
4.5.	Extension: Transformative Competence, Human Elements and Interconnected Circles	106
4.5.1.	Spirituality in TC.....	107
4.5.2.	Transformative Competence.....	109
4.5.3.	Order and Illustration	111
4.6.	Transnational Competence for Trade Union Education	112
	Conclusion.....	118

5.	Chapter: Research Design	121
5.1.	Research Problem	121
5.2.	Research Purpose.....	122
5.3.	Research Question(s)	123
5.4.	Research Philosophy.....	124
5.5.	Research Methodology.....	125
5.6.	Case Selection.....	127
5.7.	Research Methods.....	134
5.7.1.	Data Collection.....	134
5.7.2.	Data Analysis.....	137
	Conclusion Part II	140

PART III – TRADE UNION EDUCATION AT EUROPEAN LEVEL

6.	Chapter: Trade Union Education made by the ETUI	142
6.1.	Course Programme.....	143
6.2.	Course Planning	146
6.2.1.	Selection of Venues	147
6.2.2.	Future Educational Activities.....	149
6.3.	Challenges to Transnational Trade Union Education.....	150
6.3.1.	Pedagogical Approach	150
6.3.2.	Resources.....	155
6.3.3.	People.....	163
	Conclusion.....	177
7.	Chapter: ETUI Training for European Labour Representatives	179
7.1.	The ETUI’s Learning Pathways	181
7.1.1.	The ETUR Learning Pathway	184
7.1.2.	The EWC Learning Pathway	197

7.2.	Discussion	221
7.2.1.	Significance of Transnational Trade Union Education	221
7.2.2.	Education Triangle: Distribution of Knowledge – Attitudes – Skills in ETUI Education	221
7.2.3.	Transnational Competence Profile.....	224
	Conclusion.....	228
	Conclusion Part III	230

PART IV – TRANSNATIONAL TRADE UNION EDUCATION IN TWO DIFFERENT NATIONAL CONTEXTS

8.	Chapter: Trade Union Education in Germany	235
8.1.	Politische Bildung in Germany.....	237
8.1.1.	The Concept of Bildung.....	237
8.1.2.	Politische Bildung (Political Education): History and Institutional Background..	238
8.2.	Trade Union Education in Germany.....	241
8.2.1.	Course Programme.....	241
8.2.2.	Transnational Courses	248
8.2.3.	Education Triangle: Distribution of Knowledge – Attitudes – Skills	259
8.2.4.	Course Planning	261
8.3.	Challenges to (Transnational) Trade Union Education in Germany	263
8.3.1.	Understanding of Trade Union Education.....	263
8.3.2.	Pedagogical Approach	266
8.3.3.	Resources.....	270
8.3.4.	People.....	281
8.4.	European Works Council Training at DGB BW, Verdi and IG Metall.....	290
8.4.1.	Course Programme.....	290
8.4.2.	Selection of Participants.....	292
8.4.3.	Visibility.....	293

8.4.4.	Human Resources	293
8.4.5.	Competitors.....	294
8.4.6.	Individual Commitment to EWC Training	295
Conclusion.....		298
9.	Chapter: Trade Union Education in Ireland	307
9.1.	Community Education in Ireland	308
9.2.	Trade Union Education in Ireland.....	311
9.2.1.	Course Programme.....	311
9.2.2.	Transnational Courses	316
9.2.3.	Education Triangle: Distribution of Knowledge – Attitudes – Skills	321
9.2.4.	Course Planning	322
9.3.	Challenges to (Transnational) Trade Union Education	324
9.3.1.	Understanding of Trade Union Education.....	324
9.3.2.	Pedagogical Approach	327
9.3.3.	Resources.....	330
9.3.4.	People.....	353
9.4.	European Works Council Training at ICTU, SIPTU, Mandate and UNITE	357
Conclusion.....		359
Conclusion Part IV.....		362

CONCLUSION

10.	Chapter: Conclusion.....	364
10.1.	In Search for Solutions	368
10.1.1.	The Present Situation	371
10.1.2.	Significance of Transnational Trade Union Education	372
10.1.3.	Education Triangle: Distribution of Knowledge – Attitudes – Skills	375

10.1.4.	Transnational Competence Profile of Trade Union Education at EU Level, in Germany and in Ireland	379
10.2.	Answer to the Research Question	390
10.3.	Implications of Transnational Competencies on Cross-border Labour Collaboration	392
10.4.	In Search for Explanations	395
10.5.	Contributions and Limitations to Knowledge.....	398
10.6.	Recommendations for Future Research	399
10.7.	Recommendations for the Educational Praxis.....	400

Appendix

A.	Field Work and Research Stays.....	402
B.	Archives, Libraries and Databases that gave Access to Documents	402
C.	Participant Observations	402
D.	Non-participant Observations	403
E.	Interviews/Personal Conversations.....	404
F.	Methodological Note on the ETUI Madrid Survey.....	408
G.	Methodological Note on the Beckers EWC Survey	420
H.	Excursion: Why do least ETUI Activities take place in the Nordic Countries?	427
I.	Bibliography.....	431

ABSTRACT

A lot has been written about cross-border labour action, and trade union education has been acknowledged several times as an important factor to improving it. However, neither has been researched much about trade union education, nor its potentials and suitability for enhancing sustainable transborder collective action. Therefore, the thesis investigates the extent to which trade union education in Ireland, Germany and at European level fosters labour representatives' abilities to teamwork across borders. The concept of Transnational Competence (TC) serves as a means to assess how far workers and their representatives are facilitated to act beyond national borders. Since the original framework is insufficient for critical-emancipatory trade union education, TC is extended by a sixth competence, called *transformative*. Overall, the thesis aims to make a contribution to the labour revitalisation literature in particular and the general debate about the future of Social Europe.

The study builds on a 'most different' case design and strives for a holistic approach to analysis. The holistic approach is applied through a three-dimensional comparative analysis which takes a cross-national, multi-level and multi-sectoral view and includes the human elements of mind, body, heart and soul. The findings of the thesis are the result of an extensive literature review and extended fieldwork. During 6 months at the European Trade Union Institute (ETUI) in Brussels, 3 months in Germany and the remaining time in Dublin, 47 interviews were conducted. Additional data was collected through document analysis, (non)-participant observations as well as two non-representative surveys. Innovative is the attempt to connect the structural, organisational and individual level of analysis with the view to transformative changes at all three levels. The particular focus lies on the individual since this level of analysis has been underexplored.

The thesis shows that trade union education at European level as well as in Germany and in Ireland is hardly designed to facilitate workers and their agents in transforming themselves, their organisations and the wider economic, political and social structures. Transnational educational activities at EU level and in Germany address all six transnational competencies, albeit to varying degrees and qualities. With the exception of one union, educational programmes in Ireland do not have any real transnational intent.

Thus, despite their embeddedness in different national institutions and sectoral conditions, trade unions in Germany and Ireland are 'united in diversity' concerning their low engagement in transnational trade union education – even though German trade unions are a little further than their Irish comrades. The thesis identifies opportunities how trade union education at European and national level can be improved.

STATEMENT OF AUTHORSHIP

I hereby certify that the submitted work is my own work, was completed while registered as a candidate for the degree stated on the Title Page, and I that have not obtained a degree elsewhere on the basis of the research presented in this submitted work.

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CHAPTER 1 – INTRODUCTION

Although labour engages in transnational teamwork in many ways and at multiple levels – for example, through Interregional Trade Union Councils, European and global trade union confederations, European and global industry federations, European and World works councils, European and International Framework Agreements, transnational campaigns and action days – results have remained limited (Demaître & Jagodziński, 2011; Knudsen, Whittall, & Huijgen, 2007; Pulignano, 2007; Shaiken, Herrnstad, & Worthman, 2002; Whittall, 2000).

A prime example of international solidarity is in the maritime sector. The seafarers' and dock workers unions can look back on a long tradition of sustained internationalism, political activity, mutual support and determination in collaboration (Fairbrother, 2013; Jenkins & Turnbull, 2011; Koch-Baumgarten, 1998, 2006; Lillie & Martínez Lucio, 2004; Munck, 2012; Turnbull, 2007; Urata, 2011; van der Linden, 2008). This is, for instance, expressed through the 'Flags of Convenience (FOC)' campaign, which the International Transport Workers' Federation (ITF) and their national affiliates have been waging successfully for more than 60 years (e.g. Anner, Greer, Hauptmeier, Lillie, & Winchester, 2006; Koch-Baumgarten, 1998; Lillie, 2005).¹ And yet, only a quarter of all FOC ships are protected by the ITF agreement today (ITF, 2013; New Unionism Network, 2013).

However, trade unions in Europe and around the world are in urgent need to improve international solidarity, because solidarity is one strategy to revitalise the movement (Frege & Kelly, 2003; Turner, 2004; Voss, 2010). Revitalising the labour movement is crucial, for trade unions have been losing power over the last decades, economically, politically, socially and organisationally. "Across the board we have been losing ground, despite some local victories" (Gallin, 2014: 114).

Increasingly, neoliberal ideology as well as a lack of democratic decision-making have come to dominate the European political agenda (Bieler, 2013; D'Art & Turner, 2008; Erne, 2008; Friedman, 2009; Hancké, 2000; Martens, 2003; Munck, 2002, 2010, 2012; Streeck, 2009). Society appears to underpin this trend, as European citizens have just elected, in 2014, a business-friendly centre-right Commission President in Brussels. Modern technology, decreasing transport costs and globalised production and supply chains have all provided employers with opportunities for restructuration, rationalisation and relocation. Managerial

¹ Driven by price competition, many ship-owners use the possibility to 'flag out', i.e. to register a vessel in another country than the country of ownership. They do so in order to circumvent labour regulation and avoid the higher costs associated with humane employment conditions. The ITF and their affiliated seafarers' and dockers' unions have, therefore, been developing a floor of rights for maritime labour who serve on a FOC vessel regardless their nationality. Impressively, the ITF takes the role of the national trade unions and negotiates internationally on behalf of FOC crews against exploitation, unsafe working conditions and for decent minimum wages. Although ship-owners are still not yet prevented from flagging out, they must at least adhere to minimum employment standards set out in an ITF Standard Collective Agreement. A worldwide network of 130 inspectors is responsible to ensure compliance (ITF, 2013).

prerogatives, meanwhile, have gradually emphasised individualism and, hence, opposition to workers' collective representation (D'Art & Turner, 2008). The decline in industry and the rise of the service sector has shifted the occupational domination "from manual to mental work" (ibid: 167). Thus, forms of atypical/flexible employment have grown, along with the members of a traditionally atypical and unorganised workforce, i.e. females and migrants (Hyman, 1994, 2011a; Visser, 2012). As a consequence, unions' national membership levels and mobilisation capacity have been shrinking since the 1980s, whilst the vast majority of the world's workers have still not been organised (Bieler, Lindberg, & Sauerborn, 2010; D'Art & Turner, 2008; European Commission, 2013; Friedman, 2009; Gumbrell-McCormick, 2013; Visser, 2012; Voss, 2010).

In sum, while (European) capital has gained regional structural support and institutional freedom, labour has lost bargaining power as well as political and social legitimacy. "All European unions face hard times, but for some they are harder than for others" (Gumbrell-McCormick & Hyman, 2013: 51). Following Kelly (1999), this development reflects a wider, concerted, strategic counter-offensive by both employers and national governments to the post-war gains of labour.

The crisis of labour seems deep. Multinational capital is far more developed in resources and coordination than the majority of trade unions (Gumbrell-McCormick, 2013). Trade unions are described as rather defensive and reactive (Hyman, 2011a), even passive, as in Ireland (Erne, 2013a). Thus, Visser (2012: 130) proclaims that "21st century capitalism will be shaken up by banks rather than by trade unions". Friedman (2009) asks whether labour is dead altogether, and few today believe that trade unions can rise to a level of power that can fundamentally reform or even revolutionise human society, not even trade unions themselves (Bürgin, 2014). The crisis of labour seems, hence, also a cultural one: a "crisis of orientation and identity" accompanied by a "lack of clear objectives and a long-term vision" (Gallin, 2014: 111).

Therefore, labour renewal must essentially be a cultural renewal, especially in terms of imagination, utopia, vision, alternatives, values and offensive. Gumbrell-McCormick and Hyman (2013: 204) suggest,

"union revitalization requires a new, imaginative – indeed utopian – counteroffensive: a persuasive vision of a different and better society and economy, a convincing alternative to the mantra of greed, commodification, and competitiveness [...] and austerity, a set of values which connects with everyday experience at the workplace".

Cultural labour renewal, from this perspective, must bring about a new form of international solidarity, a so-called New Labour Internationalism (NLI). NLI requires strong and healthy human relationships, engagement that goes beyond national self-interest, active participation

in international joint activities and leadership along a global union strategy. In short, it requires "commitment to international trade unionism" (Croucher & Cotton, 2009: 70).

But how can NLI be created? What exactly is it that would make labour fit for transnational teamwork? Practically, transnational action is inevitable. In theory, according to Koehn and Rosenau (2002, 2010), the key to effective transnational solidarity is 'Transnational Competence' (TC). TC would involve understanding others' country-conditions and cultures, engaging in meaningful dialogue in others' languages and developing and maintaining international relationships. Hoffmann (2011: 77) argued that "one central shortcoming in terms of Europeanisation of the trade unions is the poor intercultural competence of the players involved – whether we are talking about honorary or full-time staff". Telljohann (2007), as well as Müller and Rüb (2007), point to the strong need for educating and training individual unionist to become equipped with the knowledge and capabilities that make everybody fit for multi-cultural and multi-lingual representation roles.

Given this, there is a strong case for trade union education in both individual and collective terms at all levels of the labour movement. Education for collaboration would not just include up- and reskilling in professional respects. Gold and Rees (2013: 550), for example, make clear that "the qualifications of EWC members [...] could be improved". Also, personal knowledge, attitudes and actions required rethinking.

In fact, several examples point out that trade union education can have a vital impact on the power of labour. Croucher & Cotton (2009: 111) found that continuous "education was a major facilitator in building relationships, local capacity and creating the possibility of dialogue". Their statement finds support in Novelli (2011), who found that the sustained mutual education of both workers and the community marked the beginning of the successful transnational solidarity campaign of the Colombian union SINTRAEMCALI. Bernaciak (2010) and Whittall (2000) showed, for Volkswagen and BMW/Rover, that education seminars preceded the actual establishment of their European Works Councils. Educational activities were perceived by the participants as invaluable informal settings for getting to know each other. Erne (2008) showed that the support of the federal education department of the German Metal Workers' Union was crucial to the success of the transnational collective actions concerning the emblematic ABB-Alstom case. Knudsen (2004) is, likewise, convinced that, through education, EWCs can overcome the obstacles which have prevented them from having more impact on managerial prerogatives. Bicknell (2007: 113) argued that "'trust', 'talk' and 'training'" may help labour resist management attempts to 'play off' workers from different productions sites against each other.

Despite the obvious usefulness of education for revitalising the power of labour, research on trade union education has remained sparse in Europe and the world. "Even where it exists,

discussion, debate, analysis and empirical research on trade union education remains at the margins of the furious debates over trade union renewal” (Stirling, 2007: 207/8). Yet, “a failure to establish training firmly on the [research] agenda [...] is likely to perpetuate a situation in which international trade union solidarity will remain little more than a ‘permanent conference call’” (Miller & Stirling, 1998: 49). Otherwise put, if both scholars and unionists in all corners of the world keep distancing themselves from embracing personal development for decisive momentum in the context of labour revitalisation, the ‘commitment to international solidarity’ will remain underdeveloped, as will the knowledge of trade union education.

The purpose of this PhD thesis, therefore, is to advance this hitherto highly neglected research area by asking: *To what extent does trade union education in Ireland, Germany and at EU level foster labour representatives’ transnational competencies, and what are major challenges to achieving that?*

The question is approached both theoretically and empirically. Part I argues that the factors that may foster and hamper transnational collaboration can be found in structures, organisations and individuals. Particular emphasis is put on the latter, as this area has remained underresearched. Part I concludes that transformative changes are necessary in all three areas in order to improve transnational labour collaboration.

Change always starts with the individual. How education and training impacts on the individual may spill over to other people, their organisations and structures once new insights, attitudes and skills are shared and applied. Therefore, trade union education is important to every single member of the European and global labour movement overcoming the challenges of joint cross-border action, creating opportunities and acting purposefully upon them. However, it must be kept in mind that education is not a quick solution, but a long-term, lifelong and lifewide endeavour.

Given the importance of education for transnational labour collaboration, part II investigates the theory of (trade union) education. It argues that trade union education must provide knowledge, attitudes and skills that address all four human elements, namely mind, body, heart and soul. Subsequently, the concept of Transnational Competence (TC) is introduced as a tool for enhancing cross-border teamwork. TC comes from the international political science and management literature. Whilst the existing framework of five interrelated competencies – *analytic, emotional, creative/imaginative, communicative, and functional* – is surely vital to fostering transnational collaboration, it seems insufficient for evolving transformative change. Therefore, TC is extended by a sixth competence, called *transformative*. The extended framework is filled with items from part I. Crucial for transnational competence building is a firm commitment to critical pedagogy.

The final chapter in part II outlines the research design, proposing a three-dimensional comparative study with a cross-national, multi-level and multi-sectoral views. This type of study builds on a 'most different' case design and strives for a holistic approach to analysis.

Parts III and IV comprise the empirical part of the project. Part III outlines trade union education at the EU level through the example of a leader in the field: the Education department of the European Trade Union Institute (ETUI). Particular focus is given to training for European trade union Representatives (ETURs) and European Works Councils (EWCs). Invaluable are the observations of the 'Beckers EWC training'. Part IV explores transnational trade union education in two different national contexts: Germany and Ireland. In Germany are analysed nation-wide educational activities by the confederation (DGB Bildungswerk BUND) and its two largest affiliates, the public and private services union (Verdi) and the manufacturing workers (IG Metall). Subsequently, the activities of the Irish trade union confederation (ICTU) and its five biggest affiliates – SIPTU, IMPACT, Mandate, TEEU, and UNITE – are examined.

The vertical comparison between the European and national level is interesting because trade union education at EU level is fully transnational, whilst national unions have different degrees of supranational orientation. This degree can reflect the number of transnational courses that national trade unions have in their educational programmes as well as in their collaboration with the ETUI. Indeed, German trade unions have recently expanded their partnerships with the ETUI. Irish trade unions participate in ETUI's activities, but they seem uninterested in pushing collaboration further at this stage.

Comparing trade union education in Germany and Ireland horizontally is interesting because both countries differ institutionally in their models of capitalism, industrial relations system, union identity, location in Europe, etc. (see chapter 7). German trade unions have more resources and institutional support than Irish unions regarding educational leave for labour representatives and trade union members.

Moreover, diverse are the trade unions in the two countries, as they are active in different economic industries. The export-oriented manufacturing sector is more internationally engaged than services, especially public services, and counts more in the European Works Councils (EWCs) than the service sector. In fact, IG Metall has an international department and offers more transnational courses for (European) labour representatives than Verdi. Verdi provides more transnational courses in numbers than IG Metall, but these are targeted almost exclusively to educational leavers. Therefore, the impact of education on cross-border collaboration is arguably higher in IGM than Verdi, because works council members and union activists have much more collective power compared to individual participants in political education seminars.

Similarly, in Ireland, the union with an international department, yet mixed sectors, is most active in cross-border trade union education. UNITE is a special case, as the union organises across borders in Ireland and Britain. Therefore, sectoral conditions cannot explain fully why trade unions become involved in transnational trade union education; other factors must be at play, too.

Despite the differences in national institutions and sectoral conditions, trade unions in Germany and Ireland share their low engagement in transnational trade union education. It must be noted, however, that German trade unions are more engaged than their Irish counterparts. Common features in German and Irish trade union education are clearly visible and may explain why German and Irish unions are, like the motto of the European Union, 'united in diversity' around transnational trade union education.

In an effort to explore the underresearched field of trade union education, the theoretical and empirical findings of the thesis are the result of an extensive literature review and extended fieldwork. Over 6 months at the ETUI in Brussels, 3 months in Germany and the main research location in Dublin, 47 formal and informal expert interviews were conducted. Additional data was collected through document analysis, (non)-participant observations and two non-representative surveys. Innovative is the attempt to connect the structural (macro), organisational (meso) and personal (micro) levels of analysis with a view to transformative changes at all three levels.

In conclusion, the research question cannot be answered straightforwardly. Rather, the picture is mixed. The thesis shows that union activities at the EU level and in Germany address all six transnational competencies, albeit to varying degrees and qualities. Ireland seems an even more diffuse case, because its educational programmes do not – with the exception of UNITE – have any real transnational intent. Thus, Irish trade unions would have to close many more and much wider gaps than those at the EU level and in Germany to facilitate labour representatives' transnational competence.

This thesis shows, moreover, that education can have transformative power and trigger sustainable action towards the humanisation of the world of work only if the triangle of knowledge, attitudes and skills is balanced so that head, heart and hand complement each other. Knowledge and skills are important, as the unions in Ireland, Germany and at the EU level suggest. However, for revitalising the national and European labour movements, workers and their agents must go beyond that by emphasising attitudes and making them explicit areas of learning. Thus, this thesis contributes to the academic literature on (transnational) trade union education by adding to the original concept of TC more space for the heart and soul. Both emotions and spirit(uality), which are the core of transformative competence, arguably

need attention, especially for manoeuvring labour out of the cultural crisis which it has moved into.

2. Chapter: Transnational Labour Collaboration between Bust and Boost

The number of Transnational Corporations (TNCs) has skyrocketed from around 7,000 at the beginning of the 1990s to more than 82,000 parent companies with roughly 800,000 cross-border subsidiaries today (UNCTAD, 2009). At these foreign sites, TNCs employ roughly 69 million workers (UNCTAD, 2012). According to the latest estimations of the United Nations Conference on Trade and Development, this trend in foreign direct investment (FDI) will continue (ibid).² Thus, as the President of the Swedish LO stated, “the free movement of capital, striving for maximum profits, makes it necessary for us, as workers, to mobilise, acting all over the world” (quoted in Bergene, 2009: 236; also Bernaciak, 2010; Hauptmeier & Greer, 2012; Jenkins & Turnbull, 2011; Munck, 2002; Novelli, 2011; Pulignano, 2007).

In addition to economic necessity, today’s increasingly transnational social network societies demand transnational union networks (Munck, 2010). The ever-increasing interconnectedness that globalisation and technological progress push forward, demanding interdependence as much as inter-competition between people, requires labour to connect beyond national terrains. At the same time, the course of globalisation will make international union collaboration easier in the future, since, eventually, all countries of the world are affected (suggestion of a Mauritian unionist in the garment and textile industry paraphrased from Bergene, 2010).

However, national labour representatives and union management would first have to acknowledge that the challenges global capitalism poses to them requires collaboration across borders: “no organisation, nation, region or industry is strong enough to manage this on its own” (the President of the Swedish LO quoted in Bergene, 2009: 236). For a meaningful answer to global capitalist challenges, labour would, moreover, have to consider not only its own interests, but also see the wider global damages to humanity and the environment that unconstrained capitalism causes.

Acknowledging the urgent need for transnational teamwork and adopting a wider, interconnected perspective appears a big challenge for workers and their representatives, given that effective cross-border labour action has remained very infrequent. In order to improve transnational labour collaboration, we must know the opportunities and barriers to it. Therefore, chapter 2 explores the main factors which may foster and hamper transnational collaboration.

² Typically, companies from developed countries in the North and West (but also the South like Japan) move to the so-called ‘second’ and ‘third’ world, i.e. transition economies or more commonly called ‘emerging markets’ and developing countries in the South and East of the globe. Interestingly, this direction applies both within and outside Europe. Where cheap human resource is available regionally in the Mediterranean and eastern part of Europe, the same is at hand overseas, predominantly in Far East Asia, Africa and Latin America (UNCTAD, 2012).

Arguably, workers' commitment to joint cross-border action depends on themselves as persons as well as on the organisations and structures they (co-)create. This triangular distinction mirrors Boxall's (2014: 578) "three agendas in human resource management: the individual, the organisational and the societal/global". The individual has been explored least in terms of transnational labour action and shall, therefore, be central to this analysis. Organisational circumstances are also important, not only because trade unions are, besides individuals, the main units of analysis in the later empirical chapters. Also, workers point to limitations in their organisations. Klaus Franz, European works council (EWC) chair of General Motors (GM), argues that the resources available at the national level are insufficient to influence the international course of events (quoted in Bergene, 2010: 179). Structural explanations, such as the rise in neoliberal policy-making in Europe and other 'union busting' developments, in addition to the increase in global competition, can be frequently found in the literature and will, hence, be covered rather briefly.

2.1. Cross-border Labour Competition

Competition is not only fundamental to capitalism. It is also widely agreed that competition has impacts on cross-border labour collaboration. Different plants of one transnational corporation (TNC) directly compete for production volumes and investments. Indirectly, the 'regime competition' (Pulignano, 2007: 143) between national industrial relations systems hampers transnational union collaboration. In other words, cross-border union action is influenced by competition for individual jobs and competition in local employment conditions.

There are several examples in which TNCs have attempted to benefit from regime competition by involving workers and their representatives in 'whipsawing' games (Greer & Hauptmeier, 2008: 77; Pulignano, 2007), 'coercive comparisons' (Bernaciak, 2011: 37; Larsson, 2012; Pulignano, 2007), 'inter-plant benchmarking' (Bernaciak, 2013: 140) or so-called 'beauty contests' (Bergene, 2010: 131; Bernaciak, 2011: 37). Because of the pressure created by 'competitive underbidding' (Hancké, 2000: 48), 'Unterbietungskonkurrenz' (Bierbaum, 2001: 323) and the fear of de-investment and subsequent job loss, labour in different plants is often pushed to engage in concession bargaining in terms of wages and working conditions. The result is a 'race to the bottom' that leads to 'social dumping'. Evidently, "fear is a very bad advisor. If you make decisions based on fear, that's not a good decision" (Rudi Kennes quoted in Bergene, 2010: 171).

However, neither workers in different production locations have to engage in the socially destructive games that management wants them to play, nor do trade unions and their constituency in different countries have to engage in 'labour imperialism' within Europe or worldwide (Bieler, 2013; Ghigliani, 2005; Klemm, Kraetsch, & Weyand, 2011; Mückenberger, 2011; Sjölander, 2011). Even though capitalist structures of competition may influence human

behaviour considerably, they cannot fully determine it (Sayer, 2011). People choose how they (re-)act, think and feel (Glasser, 1998).

Thus, through making decisions from a space of compassion, labour across countries can turn incitements for social dumping, self-exploitation and destruction of nature into opportunities for transnational solidarity. In other words, workers can use the wedges that employers insert to divide them and to build the bridges that unite them. Competition can, thus, be both a limiting and a triggering factor for effective cross-border action: "competition can frustrate cooperation, but it also motivates it" (Anner, Greer, Hauptmeier, Lillie, & Winchester, 2006: 24). Otherwise put, cross-national labour collaboration can arise both despite and because of global competition.

So far, however, the majority of the roughly 1000 EWCs have not managed to transform global competition from a factor that hampers transnational collaboration into one that fosters it. The case of General Motors in Europe has attracted many researchers (Bergene, 2010; Bernaciak, 2013; Fetzer, 2012; Greer & Hauptmeier, 2008, 2012; Hancké, 2000; Pulignano, 2007). Despite the high transnational coordination activity by the European Employee Forum (EEF) over almost two decades (1996-2012) and a number of isolated successes, the EEF was unable to overcome inter-plant labour competition and prevent overall loss in production output and employment.³ GM Opel was "a showcase of transnational labour cooperation, [and] it was heart-breaking when it fell apart" (Hauptmeier, 2014, IREC Conference Dublin).

The case studies of BMW and VW tell us that, for effective and long-term sustainable cross-border action, relations between representatives must be based on trust and compassion (Bergene, 2010; Bernaciak, 2010, 2011; Greer & Hauptmeier, 2008; Lillie & Martínez Lucio, 2004; Pulignano, 2007; Whittall, 2000, 2007).⁴ Furthermore, continuing participation and success in joint actions appear vital for cross-border solidarity to grow. On the one hand, it may wake up workers and their representatives to become more aware of regional and global issues (Bergene, 2010). On the other hand, joint actions seem necessary bonding experiences to create a feeling of trust and solidarity. Granovetter (2005) confirms that through repeated social interaction and collaboration, trust within a group of people is developed.

Likewise, it is crucial for national unionists to appreciate others' more advanced skills and learn from the more appropriate features of other industrial relations systems. Representatives have, moreover, to embrace learning new competencies. In addition, both they and their

³ On the basis of Bernaciak (2013), car production at GM Europe decreased by 40% between 2000 and 2011. Employment fell by 55% during the same years. Whilst the UK was the biggest loser of jobs (-63%), Poland gained 68%. Due to the reduction of staff, work intensity increased. Where in 2000, a worker produced on average 25 vehicles per year, it were 33 in 2011. How much worse would the situation have been without the EEF though?

⁴ The former VW works council chief, Klaus Volkert, spent in jail due to a corruption affair. He obviously accepted special boni, corporate privileges and 'hot nights' in Brazil from Peter Hartz, member of the VW Directors Board responsible for Human Resources and prominent for creating the quite neoliberal Hartz-reforms (Willeke, 2007).

unions are required to improve their internal structures. They also need to delegate more authority and resources to the European as much as global unions (Stevis & Boswell, 2007).

Yet, Whittall (2007) concludes that the BMW EWC has not developed a collective European identity, but has remained nothing more than a contact network. In VW, transnational collaboration came to coexist with concession bargaining. Although the former was utilised, the latter was still not eliminated (Bernaciak, 2011; Pulignano, 2007).

Since a few EWCs navigate global competition more or less successfully, competition appears an insufficient explanation for why most EWCs' capacity to create effective transnational collective action has remained poor. Apparently, there are other issues at play that have so far been marginalised in debates about transnational labour collaboration. Arguably, these issues can be found at the underresearched individual level. As we will see in chapters 7 and 8, flaws in trade union education also hamper young EWCs from building a strong and collaborative fundament with a transformative spirit. First, however, we will explore further opportunities and barriers that trade unions face in view of improving cross-border collaboration.

2.2. Political Support and Union Busting

Given the neoliberal political dominance in Europe,⁵ a trend in deregulating coordinated market economies (CMEs) can be noticed. Thus, employers are given more and more room to undermine union recognition. In Germany, institutions have clearly changed along liberal lines, to some extent (Erne, 2008; Hall & Thelen, 2008; Hoffmann, 2007; Jacobi, 2003; Streeck, 2009; Upchurch et al., 2009).⁶

Similar instances have occurred in the more liberal market economy (LME) of Ireland. Not only as a result of labour's traditionally weak institutional support, but probably also due to the voluntary and more adversarial history of Ireland's industrial relations, the 22-year old tradition of national tripartite concertation eventually collapsed in December 2009 (Sheehan, 2010). Collective bargaining in Ireland has been decentralised and fragmented, moreover, as a consequence of the crises in Europe (Trif & Doherty, 2014). As we will see in chapter 9, the breakdown of the Irish social partnership has shaken the labour movement considerably and resulted in reduced financial support from government.

⁵ European voters have expressed labour-unfriendly preferences. The majority of the 28 national governments are centre-right (10) and liberal (7) in 2015 (Nardelli & Arnett, 2015), and as such rather support a business-friendly agenda. "Businesses prefer a modern, stable, liberal democracy as the most secure political context for their investments" (Stanford, 2010: 233). One may, therefore, also wonder how Social Democrats – who usually are in support of labour – understand social-democratic policy these days, keeping in mind the fairly liberal Hartz-Reforms in Germany that were introduced by the Schröder government (1998-2005) in 2003.

⁶ The "creeping erosion" (Jacobi, 2003: 212) of 'Modell Deutschland' or 'Rhineland corporatism' can, on the one hand, be seen in the trend in decentralising collective bargaining to firm level. Employers have pushed unions for opening clauses in order to allow divergence from the traditional sector agreements (Krämer, 2009). On the other hand, "zones of union-free and works council-free employing organizations" have especially increased in the private sector and among small and medium enterprises (SMEs) (Jacobi, 2003: 212).

The conditions for labour in Europe are, however, not as threatened as in the developing countries of the global south, where unions may be busted not merely through personal intimidation or by strikes being declared illegal, like in Europe (Gall, 2003). Rather, union leaders and members, as well as other sympathetic actors, may fall victim to assassination, imprisonment and other physical harm (Adanhounme & Lévesque, 2013; Bergene, 2010; Lethbridge, 2011; Novelli, 2011; Sjölander, 2011).

In order to compensate for the loss of political and social legitimacy in their home countries, unions may need to find other allies within or across national borders. Conversely, if labour enjoys a favourable national political climate and perceives its home power resources as sufficient, unions would rather not feel obliged to actively seek collaboration with fellows and like-minded groups (trans)nationally. Therefore, we are currently in a political-institutional phase in Europe that appears favourable for transnational union collaboration to arise. However, so far, an innovative form of transnational teamwork, such as New Labour Internationalism (NLI) (see 2.3.5.1.), has remained largely missing.

2.3. Resources

Improving cross-border labour relations requires resources as much as trade union education does. Edwards and McCarthy (2004) distinguish five types of resources: material, human, social-organisational, moral and cultural. The authors stress that these resources are distributed unequally among social movement actors in a way that mirrors the stratification of societies.

As will be seen in the empirical chapters (6 to 10), resources are a central issue for trade unions. Labour organisations at the European level, as well as trade unions in Germany and Ireland, highlight the limitation in, especially, financial and human resources. For EWCs in particular, information exchange and networking are vital as social-organisational resources. German and Irish unionists refer occasionally to missing cultural resources, mainly collective identity. The goal of trade union education at the EU level is to develop representatives' European identity. Moral resources are essential for recognising injustices and practicing solidarity. Anticipating individual opportunities and obstacles, the perception of injustice is a necessary ingredient for mobilisation.

2.3.1. Material Resources

The material category comprises not only money but also property, office space, equipment and supplies. While these are assets, they require money for purchase and maintenance, e.g., rent, facility management, insurance, etc. Unions receive money through entrance and monthly membership fees. Donations and subventions, as well as contributions to benefit schemes, can also be received from sources external to the labour movement. Unions pay money for staff, administration, campaign materials, strike days and potential members' benefit schemes (van der Linden, 2008).

As to the survey by Larsson (2012), trade unionists consider the unequal availability of financial resources the number one obstacle to transnational union collaboration. This inequality is mirrored in the ETUC's new internal quota system, where unions in Eastern Europe pay pro rata just 25% of the fees that unions in the west of Europe are charged (ETUI, 2014b; Hyman, 2013). At the same time, the amount of money which trade unions in the more developed countries make available for transnational teamwork must be questioned. The DGB has sent, between 1989 and 2012, only from a low of 1.3% (2000) to a high of 1.7% (1994-96 each) of membership contributions to the international level (DGB annual reports). The German Metal Workers' Union appears to have a flat rate for expenditures on the International Metal Workers' Federation of just 0.3% of membership contributions (annual reports 1989-2006). Even less appreciated seems the European Metal Workers Federation (EMF). Despite the fact that IG Metal has increased its EMF contribution steadily between 1989 and 2006, it stood still at 0.18% in 2006 (IGM annual reports).⁷

As a result of vanishing membership dues, the (inter)national union structure has become increasingly dependent on external money sources. The ITGLWF, for example, now sustains itself mostly from donations (Bergene, 2010). The ITUC has opened a Solidarity Fund for accepting donations, too, because its income from membership fees is not enough to sustain the representative body (Gumbrell-McCormick, 2013). The ITF was established in 1981 as an independent charity fund. The Seafarers' International Welfare Assistance and Protection Fund is partly financed by employers' contributions (Anner et al., 2006), but it also operates from donations and a portfolio of investment assets (ITF, 2011).⁸ Reflecting the German unions' funding structure, the ETUC created the European Worker Participation Fund (EWPF) in 2008, which obliges board-level employee representatives in European companies to donate a substantial part of their remuneration to fund research and training activities (chapter 6). Irish

⁷ In the subsequent years, IGM has summarised their European/international contributions. Therefore, we may not differentiate contributions between European and international level anymore.

⁸ Within 30 years of existence, the fund has made £140 million and has spent it on more than 550 ports in 106 countries. During 2011, nearly £1.9 million could be achieved. The main goal of the fund is "providing for the special welfare of Seafarers of all nations, and assisting them and their dependents in conditions of sickness, hardship and distress" (ITF, 2011: 4).

unions have not created a fund akin to the EWPF or to the DGB's Hans Böckler Foundation (chapter 9).

Critically speaking, though, it seems that labour has always had difficulty being financially independent: "much national and international union solidarity activity is still [...] financed by the state or inter-state organisations" (Munck, 2010: 222). The ETUC, its affiliated research and education institute ETUI, as well as the ETUFs, are financed largely by the European Commission because its national affiliates are not ready to allot more resources to the European level (Hyman, 2013; Martin & Ross, 2001).⁹ In addition, Novelli (2011) and Klemm et al. (2011) report of so-called 'yellow unions' who are co-financed by employers.

However, dependency on external resources and, consequently, the incapacity to produce internal assets involves not just the danger of losing these as quickly as they might have come. Rather, by keeping themselves dependent on external sponsors, unions are at risk of losing power and control over their own goals and becoming biased. For example, despite their official political independence, unions may be forced to become accomplices in progressing the neo-liberal political agenda if they keep themselves dependent on donors from the centre-right governments that are currently dominating the European political landscape. Instead of pushing forward Social Europe, they would be 'obliged' to make pro-capital concessions.

Financing labour activity seems, therefore, partly a political strategy to keep labour quiet and under control while creating room for manoeuvring the capital-friendly European market integration process. The empirical chapters will show that the strings attached to external finance affect trade unions at the European and national levels differently.

2.3.2. Human Resources

According to Edwards and McCarthy (2004), human resources relate to labour power as well as the individual capacities, which are made up of knowledge, skills and experience. Taylor and Whittier (1995: 168) specify that "education, gender, race, ethnicity, and class background provide groups with a distinct set of beliefs and skills". Especially essential is the value which an individual can add to a particular situation (Edwards & McCarthy, 2004).

Since the human resources available differ very much from union to union, the composition of staff and members may limit or enhance labour to engage in cross-border collaboration. In addition, because of the decrease in membership for the last three decades, the human resources available have become scarcer. Bicknell (2007) notes that despite a favourable attitude towards EWCs, lack of personnel is one reason why German trade unions are hampered in taking more advantage of supranational opportunities. In fact, Verdi dedicates

⁹ The European Commission Directorate General for Employment paid accommodation and travel expenses as well as translation service for the Mannheim Seminar, a crucial transnational union get-together in the ABB Alstom merger case (Erne, 2008). The Commission pays also the national trade unionists' travel expenses for the monthly meetings of the European Economic and Social Committee (EESC) in Brussels (2014, own observation).

half a post to EWC work, whereas IG Metall increased its human resources by 100% to two full-time staff in January 2015 (chapter 8).

Besides investing in membership recruitment, therefore, it seems all the more important for unions to work with the people on board and re-educate them according to the needs of the unions as well as the whole labour movement. SINTRAEMCALI in Colombo, for instance, set up its own Human Rights Department (Novelli, 2011). By sending selected activists to courses, the company union has not only developed appropriate human resources for its future cross-border campaigns but has also reduced its dependency on external experts. Ongoing education is important for improving labour's human resources.

2.3.3. Social-organisational Resources

Social-organisational resources include the connections to people which unionists bring with them and develop over time, the quality of those connections and the kind of information they can hencewith access (Martínez Lucio & Weston, 2007).

Müller and Rüb (2007) illustrate how important close ties between EWC members are in order to build a common identity. These ties may develop through spending time and getting to know each other in both professional and private respects. Kotthoff (2007: 179) calls this networking for "live world aspects". This would mean talking not only about the different standards in employment relations systems but also about everyday life. Especially, informal events such as coffee breaks, the evening socialising programme and mutual visits would suit building such connections and "learning more about the 'basics' from other countries" (Andersson & Thörnqvist, 2007; Huijgen, Whittall, & Knudsen, 2007: 218; Klemm et al., 2011). "Sports tournaments, barbecues, parties and karaoke nights" appear very important for building cohesion on-board multiculturally staffed ships (Markkula, 2011: 299).

Importantly, interpersonal connections must be kept up through communication in between events and actions. Tully (2004) and Telljohann (2007) describe how select committees can facilitate EWC delegates to stay connected. The successful transnational ABB Alstom case featured a group of representatives who were responsible for building an activist network (Erne, 2008).

The increased mutual familiarity with colleagues in their professional and private roles may diminish the social distance between them and build personal connection and trust. Networks can strengthen and extend trust, reciprocity and cultural learning not only between labour representatives, but also among different labour communities (Turnbull, 2007). Whether personal or electronic, networks may also provide a platform for debate, in particular among the rank and file (ibid). Through discussion, workers and their representatives are enabled to develop a view for the 'bigger picture' and perceive issues "in a broader and less parochial way" (Tully, 2004: 175). Closer and more trustful connections can inhibit comrades from

'biting' each other and constitute, thus, an important precondition for long-term collaboration (Klemm et al., 2011).

2.3.4. Moral Resources

Edwards and McCarthy (2004) point to legitimacy, solidary and sympathetic support as well as celebrity as making up moral resources.

Legitimacy can have several origins, yet most of all it stems from legislation and through political and public support. However, union leadership can provide rightfulness for action, too. Erne (2008: 146) remarks, regarding ABB Alstom that, even if rather symbolic, the support of the ETUC and EMF leaders towards the joint demonstration in Paris in June 2003 was important in that it created a "European legitimacy". This, in turn, fostered collaboration among different national trade unions. Furthermore, the involvement of major (international) organisations may also create a space of legitimacy. In order to focus on human rights and corruption, the Colombian union SINTRAEMCALI worked together with Amnesty International and Human Rights Watch (Novelli, 2011) while President Hernández personally involved the ILO (Suhner, 2004).

As will be examined more deeply in the following chapter, when actors provide solidary and sympathetic support, they are not directly affected by particular circumstances at a given moment in time, but they get involved nevertheless. Supporters may do so because they anticipate future impacts, or the case they support might address values or ideas that they share with those who are directly concerned. In the case of Burberry, for instance, affiliated unions in France and the US provided symbolic support to their colleagues in south Wales (Jenkins & Turnbull, 2011). Drawing again on SINTRAEMCALI, the rank and file committee, which can be seen as the hard core of activists, did not comprise only its own union members. Local representatives from other employers, in addition to community leaders, leftists and radical human rights activists, engaged in their case (Novelli, 2011). This shows that solidary and sympathetic support can come from both within the labour movement and outside.

From the outside, also, stars from show business and sports can provide labour with moral support. Hanna-Maria Seppälä, a Finnish world champion swimmer, for example, supports the EPSU's transnational 'Right2Water' campaign (EPSU, 2013). The same is true for Konstantin Wecker, a prominent German musician, composer, actor and author, and many more such persons. These people can not only strengthen workers' morale. They can also provide an emotional connection to the public, since citizens often identify with them. Media-effective and sports personalities are, arguably, also in a formidable position to underpin the labour movement with donations, whether of time, space or money. It seems, however, that trade unions do not usually use potential celebrity allies, as evidence of this happening is hard to find.

2.3.5. Cultural Resources

In terms of cultural resources, Edwards and McCarthy (2004) mention artefacts, conceptual tools and specialised knowledge of which people are widely aware. Artefacts may include music and songs like the Internationale or 'Into the streets May First!' by Alfred Hayes (1934). It may, likewise, include posters and pictures, flags and flyers, stickers and pins, movies and plays, newspapers and magazines, ideas and symbols, to name but a few.

A crucial artefact is rituals (Melucci, 1995; Taylor & Whittier, 1995). Not only do rituals have the capacity to build cohesion and solidarity among people, but they are also a means to express and dramatise certain perceptions and evoke emotions that may lead to mobilisation. In short, rituals serve to affirm certain beliefs (McDonald, 2002). In the women's movement, common rituals are testimonials, healing circles, songs and chants (Taylor & Whittier, 1995). Other rituals can include initiation ceremonies, regular meetings, consuming and making movies and plays, or hosting (music) festivals (ibid).

The most prominent rituals that unions are known for are strikes, marches and demonstrations, or "rallies, riots and rebellions" (ibid: 177). The number of strikes in Europe has, however, dropped significantly over the last three decades (Vandaele, 2011). This means that a fundamental cultural resource, a ritual of historical value, has faded away and, with it, opportunities to express emotions and opinions jointly whilst experiencing that 'unity is strength'.

The tools and knowledge needed to address this would comprise tacit know-how – for instance, regarding recruitment, mobilisation, administration, and information/communication technology (Edwards & McCarthy, 2004). Following Moran, Harris and Moran (2011), it would, likewise, include a sense of space, communication and language, dress and appearance (see also Taylor & Whittier, 1995), time consciousness, values and norms, beliefs and attitudes as well as mental processes and learning.

In the earlier mentioned BMW case, the difference in dress and appearance, the availability and use of space and technological equipment as well as the educational background are striking. While the German works council members possessed the latest technology and operated from a central office together with their personal secretaries, their colleagues in Britain were based in a shabby room that was not their own. They had no access to a fax machine or telephone, nor did they have administrative assistance. Whittall (2000) describes the Germans wearing expensive suits, driving BMWs and having academic degrees. Klemm et al. (2011) confirm that the power of German labour representation is revealed in high level office equipment as well as rented cars, hotels and clothes. Further research would be needed to show whether the availability of such exquisite materials and cultural resources are specific to certain countries, companies or sectors.

2.3.5.1. *Old and New Labour Internationalism*

A vital ritual for transnational collaboration is the praxis of teamwork across borders. Labour internationalism has a substantial history (Fairbrother, Lévesque, & Hennebert, 2013; Munck, 2002; van der Linden, 2008). Overall, it may be described as “a slow process, with periods of slow change interrupted by windows of opportunity” (Stevis & Boswell, 2008: 107).

A new window of opportunity appears wide open at the moment, given the ongoing economic-financial and social crisis in Europe. At the same time, we may witness a transition stage in labour collaboration which has, according to Van der Linden (2008), the potential to transform into a new form of international solidarity, i.e. ‘transnational internationalism’. For taking advantage of novel spaces and types of contestation, a radical reorganisation of organised labour seems inevitable (Lillie, 2005). As seen in the above examples of cross-border labour competition, however, the European labour movement has not yet withdrawn from the ‘old’ labour internationalism and created a ‘new’ one.

Although there is no common definition among scholars or trade unions about what New Labour Internationalism (NLI) is, what it can achieve and cannot (Ghigliani, 2005; Kloosterboer, 2007), there are certain features which appear to repeat themselves (Table 2-1):

Table 2-1: **The Main Differences between ‘Old’ and ‘New’ Labour Internationalism**

	Old	New
<i>Space</i>	Local and National	Local to Global
<i>Colour</i>	White	All
<i>Gender</i>	Men	Men and Women
<i>Region</i>	North/West	North/West plus South/East
<i>Concern</i>	Labour	Labour, Consumers; Society and Environment
<i>Employment</i>	Full-time	All kinds of contracts
<i>Approach</i>	Top-down: leadership-driven	Top-down and bottom-up: more grass-roots involvement
<i>Organisation</i>	Spatial hierarchy Mechanic-hierarchical	Spatial networks Organic-discursive/dialogical
<i>Ideology</i>	Defending unions’ and workers’ rights	Defending union and workers’ rights in addition to human rights and the sustainability of ecosystems

Source: Dufour-Poirier & Lévesque (2013), Ghigliani (2005), Hyman (2011a, 2013), Kloosterboer (2007), Lethbridge (2011), Munck (2002); own illustration

First, old labour internationalism concentrates on the national arena while the new form would overcome this geographical restriction by extending it to the international dimension. Referring to the First International and its limitations, old labour internationalism focuses on the white

full-time employed man from the industrialised world of the North and West. The new conception of international solidarity overcomes this discrimination and includes all colours and kinds of employment contracts, particularly part-time, agency and contract work. In so doing, it caters not only to the male but also female workforce. Furthermore, labour transnationalism would not remain geographically concentrated to the more developed countries but involves developing countries equally.

The new internationalism is not confined to the working class only. It likewise considers the role of consumers, which workers are, ultimately, too. Most importantly, though, the new perception of labour transnationalism takes into account the well-being of the wider society, nationally as much as globally, as well as the environment, addressing human rights issues and ecological concerns.

In addition, the old labour internationalism appears focused on industries that are international by nature, such as transport, or which have become international through market competition, like manufacturing. It is suggested, however, that more national sectors like public services and education might be seen as part of the new form of labour internationalism. Notwithstanding local and national peculiarities, there, arguably, are basic problems of organising political economies and societies and educating people which are common to every country. In these sectors, NLI might, therefore, not first and foremost be about fighting capital or the state as employer but about mutual learning from international best practices with the aim of improving the provision of and creation of national as much as international public goods.

Comparing the differences between 'old' and 'new' labour internationalism, one may be inclined to say that the former hampers international solidarity while the latter fosters it. Indeed, it seems true that the 'old' features of labour internationalism do still predominate but are not appropriate anymore, as they evidently prevent cross-border union collaboration from improvement.

There is one aspect, however, which the 'new' view of international solidarity would reanimate from the pre-national past, as Munck (2010) suggests, and that is an ideology that is more oriented towards long-term transformation than short-term gains. This is, as noted earlier, an ideology striving for emancipation, liberation, democracy and justice. Therefore, NLI seems, in fact, able to foster cross-border union collaboration because it adopts such a holistic perspective. This includes not merely a broader, global perception of the working class struggle, but also consideration of the general purpose of the oppressed as well as of human life.

As opposed to the old form, new international trade unionism would include "moral appeals to the wider international community" (Abbott, 2011: 171). As to Munck (2010), these appeals can be made from multiple levels. On local and national level, the new form of labour

internationalism would need to take some form of "social or community unionism" (also Munck, 2012: 2). On regional and global level, NLI would transcend mere cross-border collective bargaining and develop into a more "social movement unionism" (Munck, 2002: 154, see also (Baccaro, Hamann, & Turner, 2003; Gumbrell-McCormick, 2013; Lethbridge, 2011). This would, for example, include mobilisation of the rank and file through professional and well-educated organisers (so-called 'organising'), leadership involving the rank and file in decision-making, as well as building coalitions with other union and non-union actors. In this way, "unionization becomes part of a broader fight for social justice, in which labour works [together] with human rights, environmental, religious, student, feminist and other community groups" (Baccaro et al., 2003: 122/3).¹⁰

It follows that an innovative labour internationalism would, as envisioned by the Dutch labour federation, "involve organising new groups hitherto under-represented in the movement, local and transnational actions, a clear orientation towards social justice and coalitions with community groups, and last but not least, a vision for an alternative social order" (Munck, 2010: 220). This would include refraining from sexism, racism and xenophobia, and would take the World Social Forum and other 'new social movements' as models of example (ibid).

The idea of a bigger and more integrated picture of class struggle is not new. More than 40 years ago, the Austrian/French social philosopher Gorz (1968) proposed that labour needs to fight a "cultural battle for a new conception of man, of life, education, work, and civilisation [which] is the precondition for the success of all other battles [...] because it establishes their meaning".¹¹ Almost 80 years ago, the Dutch social revolutionist and Marxist theorist Anton Pannekoek (1936) advised that "workers themselves must change. They have to take a wider view of the world. From their trade, from their work within the factory walls, their mind must widen to encompass society as a whole. Their spirit must rise above the petty things around them". Had labour listened to these wise voices, it might have prevented itself from the ideological crisis into which it has grown. Workers and their representatives might have also prevented the world from the economic-financial, social and ecologic troubles we face today.

¹⁰ As a case in point, Greven and Schwetz (2011) portray how the United Steelworkers of America (USW) involved American and German industry analysts, asked German and American pensioners, health insurance interest representations as well as Church representatives for help against the German tire multinational Continental. The union also initiated the civil tribunal 'Jobs with justice' as well as a committee that included prestigious personalities from Amnesty International and German education institutions. USW received solidarity from Mexican unions and even cooperated with critically thinking capitalists, namely the Dachverband der Kritischen Aktionärinnen und Aktionäre (Federation of Critical Shareholders).

¹¹ "Meaning includes moral understandings of right and wrong, cognitive understandings of true and false, perceptual understandings of like and unlike, social understandings of identity and difference, aesthetic understandings of attractive and repulsive, and any other understandings that we may choose to identify through our own academic processes of meaning-making. [...] At its root is the proposition that humans constantly seek to understand the world around them, and that the imposition of meaning on the world is a goal in itself, a spur to action, and a site of contestation" (Kurzman, 2008: 5).

Thus, NLI would mean, above all, that labour representatives finally strived for completing “the great and historical task of the oppressed: to liberate themselves and their oppressors as well” (Freire, 2002: 44). This requires what Munck (2002: 153) describes as “beliefs about the international ‘brotherhood’ of ‘man’”. It also requires stepping out of the Marxist way of class thinking and realising that the class struggle can actually not be won before the classes as such have disappeared.¹² Admittedly, this poses a very demanding, yet very necessary mental effort for workers and their representatives, because it breaks with their conventional social thinking.

One example that accounts for the emergence of NLI is presented by Ghigliani (2005). However, while the campaign by an international group – representing 10 countries from 3 continents, namely Argentina, Russia, the Philippines, Hong Kong, the US, Germany, Britain, Belgium, Italy, and the Netherlands – included aspects of New Labour Internationalism, its failure may be described as the result of sticking to “old ritualistic practices” (ibid: 367). At the heart of the campaign was the anti-union attitude of McDonald’s and the national rights to collective bargaining and representation, which this employer undermines. Thinking about wider community issues, for instance, what consequences the ‘McDonaldisation of society’ (Ritzer, 2004), slipped the labour representatives’ minds.

Similarly, an alliance of Canadian, Peruvian and Chilean labour representatives in Dufour-Poirier and Lévesque (2013) broke down in 2 years, despite a substantial 16 year period of growth and consolidation through many NLI elements. Organisers mismanaged not only the complexity of their network but also the (partly conflicting) links between local demands and global issues. Moreover, union leadership failed, in ideological matters, to maintain meaning for transnational actions. Without meaning, human action appears worthless and irrelevant.

A more successful example is the case of the Colombian company union Sindicato de Trabajadores de Emcali (SINTRAEMCALI) (Novelli, 2011). Whilst the union attacked the privatisation and mismanagement of this major public company, it skilfully used the immediate issue to serve their long-term strategy. This strategy, apparently, is to fight against broader social issues like corruption and human rights violations of national government(s) and, hence, for a more equitable human society. Interestingly, all parties involved fought for one and the same end, namely to prevent EMCALI’s privatisation, but their motivations to engage were quite diverse. Crucially, Novelli (2011: 100/1) remarks, success for NLI not only requires time

¹² Why do both capital and labour as social classes need to dissolve? It is indispensable to remove the boxes named ‘capital’ and ‘labour’ because, on the one hand, the people in these boxes share eventually one thing, and that is being human. For the oppressed, like labour, to achieve liberation, they needed, firstly, a more encompassing conception of class, namely not ‘working class’ but ‘human class’. This might help them to arrive, eventually, at the insight that for creating liberation and unity among humanity, class thinking is not merely counterproductive but rather redundant. On the other hand, both capital and labour are interdependent. Yet, neither employees nor employers can become truly human as long as they fight against and among each other. In the words of Freire (2002: 85): “no one can be authentically human while he prevents others from being so”. Similarly, Abraham Lincoln argued that “those who deny freedom to others deserve it not for themselves” (<http://www.brainyquote.com/quotes/quotes/a/abrahamlin105879.html>, accessed 13 February 2013).

but also “requires radical and fresh thinking, a new openness to engage beyond ‘bread and butter’ issues and mechanical solidarity, a willingness to take militant action, and a desire to rekindle once again the utopian dreams of international solidarity”.

Building on the concerns of Baccaro et al. (2003), however, how sustainable will such an innovative approach to labour internationalism be if unions do not achieve structural changes? If unions fail to attack the roots of labour exploitation, no matter how innovative, any form of NLI could remain merely a means to cure symptoms rather than address causes, and that is already the current form of increasingly neoliberal capitalism, which is leading to the rise of political technocracy.

2.3.5.2. *Collective Identity*

Another important cultural resource for transnational teamwork is collective identity. Collective identity *pushes* as well as *pulls* people towards participation in a movement; in other words, it may be a major *cause of* as much as *reason for* the movement’s subsistence (Simon, Trötschel, & Dähne, 2008 emphasis in original, also Gamson, 1991; Polletta & Jasper, 2001). In brief, because of collective identity, people may commit to or withdraw from a movement. Moreover, collective identity can not only be seen as cause and effect of social movements but also as *products* of them (Holland, Fox, & Daro, 2008 emphasis in original). Eventually, collective identity is the basis for creating a cultural toolbox that contains a variety of commonly accepted strategies and methods of contention (Robnett, 2002).

Collective identity describes an ongoing human process to create meaning for ourselves and our actions (Gamson, 1991; Holland et al., 2008; Knudsen et al., 2007; Melucci, 1995, 1996; Robnett, 2002; Whittier, 2002). Meaning arises through feeling membership with a particular group, such as a group of trade unionists, EWC representatives or workers in a particular industry. This group can either be real or imagined (Knudsen et al., 2007; Polletta & Jasper, 2001).

The group or ‘we-feeling’ (Gamson, 1991; Kotthoff, 2007) is the result of the mutually reinforcing interplay of the group members’ individual cognitions, emotions and active relationships (Melucci, 1995; also Whittier, 2002), respectively, head, heart and hand (Brühlmeier, 2010). In other words, “There is no cognition without feeling and no meaning without emotion” (Melucci, 1995: 45).

Emotions, however, and their role in shaping collective identity, have hitherto remained largely under-researched (Polletta and Jasper, 2001). Emotions are obviously under-represented in collective action too: ‘there is a lot of talking, but an inability to produce emotional connection, to *sense* the feeling of the other’ (McDonald, 2002: 121 emphasis in original). The concept of Transnational Competence entails ‘emotional competence’ and seems, therefore, promising for enhancing cross-border labour action (chapter 4). The

emotions needed for triggering collective action are covered in more detail in the subsequent section on the individual.

Central to collective identity formation are perceptions of unity, mutual recognition and equilibrium (Melucci, 1995): respectively, sameness and congruence (Knudsen et al., 2007). Group unity, however, cannot be extrinsically imposed but must be intrinsically created (Hyman, 1994). It must also be constantly maintained (Melucci, 1995, 1996; V. Taylor & Whittier, 1995).

Collective identity can conflict with personal identity (Gamson, 1991), or one's "struggle for coherence of selfhood" (McDonald, 2002: 114). To align both, collective action may help if it has a wider purpose than constructing collective identity, such as finding one's place in the world as an individual as much as part of a group (McDonald, 2002). McDonald, therefore, suggests moving from the conception of a 'collective identity' to one of a 'public experience of self'. This would require a paradigm shift from analysing social movements and conflicts fairly instrumentally as mobilising mechanisms to a more organic perspective on the group members' 'shared struggle for personal experience' (ibid: 125).

Transnational collective identity – as present in the maritime sector (see Anner et al., 2006; Frykman, 2009; Jenkins & Turnbull, 2011; Lillie, 2005; Markkula, 2011; Pigenet, 2012; Turnbull, 2007; Urata, 2011) – appears inevitable for cross-national labour action (Knudsen et al., 2007; Kohler, 2006; Meardi, 2012). Conversely, we may suggest that the absence of it can hamper transnational teamwork. However, transnational collective identity is not the only kind of collective identity that human beings can adopt. Besides national and transnational collective identity, Pries (2013) suggests five other ideal types: global, macro-regional, micro-regional ethnic, glocal and diaspora (Figure 2-1).

Figure 2-1: **Ideal Types of Collective Identity**

Ideal type of collective identity	Spatial concept and reach
Global identity a concept of universal humanism and a minimum level of identity shared by all mankind	
Macro-regional identity historically based on empires and/or religion	substantial spatial concept: collective identity is ‘located’ and spatially tied to a contiguous and coherent geographical territory
National identities forged by cultural, social, political and economic institutions	
Micro-regional ethnic identities built on language, beliefs, rituals, kinship	
Glocal identity combining references of global identity and a highly specific local identity	relational spatial concept: collective identity is ‘located’, spatially distributed and spanning across different contiguous and coherent geographic territories
Diaspora identity pluri-locally distributed, with a strong (imagined) motherland	
Transnational identity as pluri-locally distributed, without a clear centre–periphery relation	

Source: Pries (2013: 30)

As an apparently holistic thinker, the German sociologist argues that, for the sake of human society, the future is about integrating and interconnecting the seven identities with each other – in other words, to building *‘as-well-as’ relations* as opposed to *‘either-or’ relations* (Pries, 2013: 36 emphasis in original). Eventually, these as-well-as relations will need to be created within the biggest unit; namely, the global humanist collective identity. It implies that we belong to the same group of earthly inhabitants, that mankind is one. The ‘as well as’ logic also means that workers and their representatives can develop the collective identity of their union, EWC, sector and a human being all at the same time. In order to develop this range of identities, Apple, Au and Gandin (2009: 11) propose participation in political action. This would be the basis for shaping “new activist identities”.

New activist identities are, arguably, needed for creating novel spaces and types of contestation integral to a New Labour Internationalism (NLI) (Dufour-Poirier & Lévesque, 2013; Ghigliani, 2005; Hyman, 2011a, 2013; Kloosterboer, 2007; Lethbridge, 2011; Munck, 2002). The sources for re-inventing and re-visioning transnational teamwork might be found in the pre-national phase of labour internationalism, when workers called for a better, more humane world (Munck, 2010). In other words, the key to unlocking *transnational internationalism* (van der Linden, 2008 emphasis in original) seems to lie in ideological concerns. In particular, it appears to require bringing back the pre-national ideology of

emancipation, liberation, democracy and justice. These themes will be taken up in the concept of Transnational Competence by adding a 'transformative competence' (chapter 4).

Collective identity may explain much, but perhaps not as much as scholars have attached to it (McDonald, 2002). Individual identities are, likewise, key to transnational action. However, the concept of identity has been broadly neglected in the industrial relations discipline (Bridgman & McLaughlin, 2013). Therefore, personal and social identity will be explored in the following section more in-depth, as well as other opportunities and obstacles to cross-border labour collaboration.

2.4. People

Besides structural and organisational factors, commitment to transnational action depends on the individual. All structures and organisations, be they public or private, are eventually constructed, maintained and changed by people. Political and economic activity is 'socially embedded' (Granovetter, 2005): the "relevant relations are not between the organizations per se but between the individuals that populate them" (Nee & Ingram, 1998: 28). More generally, "success in any endeavour is directly proportional to how well the people who are involved in it get along with each other" (Glasser, 1998: 21). In other words, success and failure of transnational labour collaboration hinges, essentially, on the people who participate. A delegate from the European Metal Workers (EMF) supports the view that people are key:

"The level of activity is very different from one EWC to another. Different factors can explain this but the decisive one is the human factor. You may have a very good EWC agreement, but it is the persons [...] in the EWC who make it an active body or not" (quoted in Bergene, 2010: 161).

If people are key to transnational teamwork, so is trade union education. Education works directly at the individual level and may spill over to other people, their organisations and structures, once new insights, attitudes and skills are shared and applied.

This section illustrates three interconnected human factors that may foster or hamper cross-border labour collaboration and be, thus, a matter of trade union education: individual commitment, the perception/composition of self and the perception of others.

In terms of commitment, three forms are suggested: *constructive*, *destructive*, and *transitional/neutral*. Examples show that both destructive and constructive commitment is present at individual, local and national level. Arguably, however, only constructive commitment to transnational labour collaboration can foster it and has the power to develop not only a new form of international solidarity, but also lead towards humanisation.

The perception/composition of self is demarcated by one's view of social character and personal identity. The third relevant field, the composition of self, is indicated just briefly, as it goes far beyond the scope of this research. Three social characters from Erich Fromm's

framework are introduced, which reflect, in many ways, the three forms of commitment: the *productive*, *necrophilic* and *authoritarian*. Seemingly, the majority of labour representatives have developed a rather authoritarian social character. For improving cross-border labour collaboration, however, more productive social characters are needed. Moreover, similar to the proposition regarding collective identity, workers and their representatives need to add to their national personal identity a transnational sphere and become culturally hybrid.

In addition to collective identity outlined in the previous section, social identity is another way to perceive self and others. Where collective identity assumes group membership, social identity does not. Eventually, social identity – whether real or imagined – is the basis for solidarity (Knudsen et al., 2007). After the concept of solidarity is clarified as resulting of ‘emotional reason’ (Sayer, 2011), two types of solidarity are presented: Durkheim’s mechanical and organic solidarity. Examples of transborder labour action indicate that what labour representatives call (international) solidarity nowadays is rather a (multi-national) interest coalition, or risk community (Fetzer, 2008; Klemm et al., 2011). It follows that most labour representatives’ social identities are inappropriate for teaming up across borders.

2.4.1. Individual Commitment

Commitment seems a big word. It has even been Germanized and can be found in the German language bible, the Duden. There, commitment is translated with ‘to confess’ and ‘to dedicate’ (“das [Sich]bekennen, [Sich]verpflichten”).¹³ This dedication can be towards something, someone or some other earthly inhabitant. As to the English language, the Oxford Dictionary explains commitment as “the state or quality of being dedicated to a cause, activity, etc.”¹⁴ In social movement theory, the definition of commitment has remained rather unclear. Hunt and Benford (2004) argue that this term is, conceptually, still hazy. Therefore, a new typology of commitment will be suggested later on.

Commitment is a serious type of human engagement. It requires conscious mental dedication and physical effort. We commit to something that is important, to something that we care about or to something that has purpose and meaning to us. Commitment is also a strong type of human engagement since commitments cannot be substituted for anything else (Sayer, 2011). They may involve explicit contracts, like the employment contract, or implicit ones, like parenthood. They may also include certain promises. Moreover, commitment is a form of self-constraint. According to the Oxford Dictionary, commitment “restricts freedom of action”. However, with reference to Glasser (1998), it is a constraint that people choose voluntarily. Everyone is free to choose whether and to what he commits or not, notwithstanding internal and external powers that influence people’s choices.

¹³ <http://www.duden.de/rechtschreibung/Commitment>, accessed 12 January 2013.

¹⁴ <http://oxforddictionaries.com/definition/english/commitment?q=commitment>, accessed 12 January 2013.

If people's decision to commit does not spring from their intrinsic motivation but from an extrinsic force, such as coercion in form of carrots and sticks, the result is not commitment, but a sterile movement (Herzberg, 1987) formed of "temporary compliance" (Stewart III et al., 1993: 37). People may comply temporarily to avoid pain and/or earn a treat. Klandermans (2004: 373) contends that carrots as "incentives [...] do increase commitment" is, hence, simply wrong.

Occasionally, a Kick In The Ass (KITA), as the well-known US-American psychologist Frederick Herzberg bluntly puts it, can have positive effects for the coerced, though. However inconvenient external forces may be perceived to be, they can offer us an opportunity to reconsider and realise what is important to us. We might, thus, gain something valuable that we have not seen as such before. As a German saying goes, 'Sometimes you need to be forced to your luck'. Nonetheless, as long as people have not 'bought into' something, as business managers like to say, they are neither motivated nor committed. Insofar as union members can be made temporarily compliant by leadership, who "kicks" the leaders?

Commitments can come over different intervals of time. We might commit to an event for some hours but also to the practice of something for years. Special commitments, like parenthood, are lifelong. In consequence, commitments may range widely in terms of their depth. Due to different levels of depth, commitments can also vary regarding the impacts they have on our lives. Arguably, the deeper we commit, the more powerful the impact on us and, hence, on our environment. In extremely deep forms, following Sayer (2011: 125), commitments can "come to constitute our character, identity and conception of ourselves". Likewise, Hunt and Benford (2004: 449) talk about the "biographical transformations" that commitments can conjure. They may become "part of ourselves" and, hence, make us suffer if we cannot pursue them for whatever reasons (Sayer, 2011: 125). The level of commitments' transformative power seems, however, contingent on how much time we spend immersed in certain activities and relationships as well as on how much we learn from them (Goodwin et al., 2004; Sayer, 2011).

Central to commitments are, as Sayer (2011: 126) argues, "the internal goods and standards" of them. We commit to a practice, group, person, place, animal, idea, thing, etc., on the one hand, in order to gain something that we value and/or need in order to survive. For example, by spending time with particular people – the self as well as others – or other things and forms of life, we may fulfil our human need for socialising and purpose in life. On the other, we also apparently commit because we enjoy exercising the tasks according to the rules that the commitment demands and that we create. After all, we commit because we are usually concerned about our well-being (Sayer, 2011). Ideally, we do not only want to win the Darwinist struggle to survive, but to live, grow and develop, to feel good, and to be happy.

It follows that commitments include both affective and mental aspects: in other words, the heart and mind. For the abovementioned 'biographical transformations' to materialise, however, commitments require more: namely, the body as much as the soul. Commitments are of holistic value only by involving all four human elements.

In sum, commitment requires responsibility and reliability to self, others and the environment. Commitment has the power to transform. As such, it is vital for developing individually as much as society. Commitments can be beneficial and harmful for individuals and human society, however. Our dedications may both support and obstruct ourselves and others in our processes of becoming (Sayer, 2011 emphasis in original); i.e., in the striving for human completion respectively the endeavour to be "more fully human", as Freire (2002: 44) puts it.¹⁵ In the following sections, three types of commitments are introduced.

2.4.1.1. *Constructive Commitment*

Beneficial commitments are engagements that help us strive for humanisation. As per the above definition, they include an affective-normative, a rational and a physical dimension. Put otherwise, constructive commitment involves ideas and evaluations of *what* ought to be, reasonable explanations about *why* that ought to be and engagements that put into practice these ideas. In short, it consists of personal values, interests and actions. (In fact, this triangle of constructive commitment reminds one of the education triangle of attitudes, knowledge and skills.) Personal values and interests may be symbolised by emotion, spirit and reason, or heart, soul and mind. The head scrutinises the heart and asks, 'Why do you commit to this? What good do you get out of this commitment? What is the 'return on investment?'' In turn, the heart and soul scrutinise the head and ask, 'Is it right to do this? Do you harm anybody or anything?' Against widespread belief that emotions just disturb our rational thinking, they are

¹⁵ What does human completion mean? The Scottish philosopher and political economist Adam Smith (1723-1790) advocates that it is love that every human being craves for (Zoll, 2000). Whether the deregulated capitalistic market economy he legitimises through his work on the *Wealth of Nations* is indeed able to help fulfil this human desire is highly questionable, though, keeping in mind the necrophilic and authoritarian characters it can create. However, we do not only want to receive love but also give it, as to the prominent natural scientist and multinational citizen Albert Einstein (1879-1955): "our task must be to free ourselves [...] by widening our circle of compassion to embrace all living creatures and the whole of nature in its beauty" (<http://www.famous-quotes.com/author.php?aid=2258>, accessed 17 January 2013). A balance between giving and receiving love would undoubtedly contribute to feeling pleased. According to the Dalai Lama, in fact, we are all seekers of happiness (Dalai Lama & Cutler, 1998).

Another representant of Enlightenment, the German philosopher Moses Mendelssohn (1729-1786), suggests that the goal of human society is to become human (Zeuner, 2011). "Menschsein" (Zoll 2000: 33) (being human) respectively 'Menschwerden' (becoming human) includes to accept that certain needs are the same for all of us human beings, namely eating, drinking, sleeping, reproduction (physical) as well as security, social relations, authenticity of self (identity) and finding a meaning in life (psychological) (Daniel, 1981). The immediate meaning in life may be different for everybody. Overall, however, we might, at some stage, in life realise that we are uncompleted beings who aspire completion; i.e. "beings in the process of becoming" (Freire, 2002: 84 emphasis in original).

Human completion respectively "becoming more fully human" means, thus, to eventually realise that not dehumanisation but humanisation is man's vocation (Freire 2002: 44). This implies conversely a feeling of moral obligation to take care, not only for oneself but also others, especially the weaker (Abbott, 2011; Hyman, 2011b).

evidently vital in our process of decision- and commitment making (Goodwin et al., 2004; Sayer, 2011).

Crucial for constructive commitment is realising that both the affective-normative and rational dimensions must not be separated but acknowledged as a unity: "cognition and emotion [...] are two sides of the same coin" (Immordino-Yang & Fischer, 2010: 313). Sayer (2011: 36) calls this unity "emotional reason" and describes it as an amalgamation of "a sense of love" and a "sense of duty" (ibid: 124/5). This amalgamation represents a balance between altruism and egoism, like egoism with a heart for self and others, or altruism with concern for own interests. Christian Arnspenger and the former Greek Finance Minister Yanis Varoufakis (2003: 170/1) name it "enlightened selfishness" and "utilitarian altruism", respectively. Thus, constructive commitment means concern not only for self but also for our surroundings. Unlike capitalist frameworks, this more holistic view implies seeing others not as rivals or competitors but companions (Kelly, 1999). One would pursue personal profits not at the expense of others, but together with them: win-win instead of win-lose.

Translated to labour representatives, constructive commitment to their role would mean pursuing what Flanders (1970) described as pursuing 'vested interest' and swinging the 'sword of justice' in equal amounts. A EWC member could, for instance, say, 'Because I love myself, I want my employer to treat me as a human being instead of a resource. Because I am compassionate to others, I want my company to do the same with all its employees over the world. Because it is important to me that my values are applied in praxis, I have chosen to commit to the role of EWC member. As part of this role, it is my duty to prepare and take part in meetings, go to language classes, network with other EWC members, initiate transnational campaigns, inform myself and keep up to date with international solidarity actions, further educate myself continuously, spend time abroad in my company's subsidiaries, etc.'

2.4.1.2. Destructive Commitment

As opposed to constructive commitment, destructive commitment occurs if personal values, emotions, interests and actions do not match or are imbalanced. A EWC member may say, for example, 'I do not like the role of transnational workers' representative, really, but I feel obliged to do it because of certain other emotional/rational reasons, or so-called secondary gains.'¹⁶ One may, likewise, say, 'I do not like the EWC work as such under the current circumstances. However, despite my dislike, I do not want to quit this job at the moment'. In other words, people might pick a commitment that pays off well and offers prospective gains without really liking it. On the other hand, people might feel good about committing to

¹⁶ For example, sometimes people are part of a group to fulfil their need of belonging. At the same time, they might have to act selfishly vis á vis others as a form of group initiation in order to gain or maintain recognition. Another example is, if people take on a job they do not like, but do it anyway for monetary reasons.

something, but it might not pay off. For example, people might accept a job because it is well paid or otherwise remunerated, but they may not really like the responsibilities that the role requires. Conversely, people might like a job, but it may not pay a living or help them fulfil basic human needs.

If we acted only on our hearts, we might waste resources or forget thinking about the long-term implications of our actions (Goodwin et al., 2004). In extreme situations, we might be inclined to sacrifice ourselves along altruistic lines, i.e., to give up ourselves for others. Conversely, if we acted according to our reason only – if this were ever possible – we could become like soldiers, i.e., human machines ready to kill. Through ongoing brutal drills, such individuals are trained to suppress emotions like compassion, shame, guilt and fear (Sayer, 2011). A military drill can cause severe mental and emotional damage (see Abé, 2012 for an example of *The Woes of an American Drone operator*). In other words, soldiers and all other people who suppress their emotions fight a psychological war against themselves and can destroy others as well as nature in consequence.

Neither living up to our values and the standards we have attached to them nor meeting our emotional, physical, mental and spiritual needs may be viable for a certain period of time. Yet, eventually, the secondary gains we may gain cannot fill the gap between our aims and achievements in the long run. This is when a feeling of stagnation and inner emptiness may arise that ultimately leads to unhappiness. In order to feel well again, people often try to compensate for their inner emptiness by consuming externalities, usually products available to buy. This is the principle of capitalism. Yet “trying to be happy by accumulating possessions is like trying to satisfy hunger by taping sandwiches all over the body”.¹⁷ What would really lead to the road to happiness again is to reconsider our conception of what is favourable and appropriate for us. Key to this is our inner wisdom, also known as intuition. Deep inside we know what is right and wrong for us to flourish.

2.4.1.3. Transitional/Neutral Commitment

In between the two extremes of constructiveness and destructiveness, there is a ‘grey zone’. Our commitment might have become a matter of habit, without any destructive emotions, but with little passion, if any. ‘Working to rule’ depicts this state of heart and mind. We might not suffer from unhappiness, yet we might not flourish either. Temporarily, we might be okay with such a situation, we might even accept it, but nothing more than that. It can even be the case that the person’s dislike of a task or standards is outweighed by any secondary gains. This stage is a weak equilibrium.

¹⁷ <http://www.goodreads.com/quotes/424976-trying-to-be-happy-by-accumulating-possessions-is-like-trying>, accessed 22 January 2013.

From a point 'in between', commitment can become both constructive and destructive. Basically, three dependant variables are crucial to commitment: the situation, the other(s) and the self. Constructively, the individual has three possibilities to act, according to Professor Uwe Kadritzke at the then Berlin School of Economics: change it, love it or leave it. Choosing the destructive mode, the individual tries to escape the uncomfortableness through trying to destroy either the situation, the other(s) or the self. Which direction people take appears to be triggered by what Klandermans (2004: 372) calls a "precipitating event".

2.4.1.4. Examples of Commitment to Transnational Action

The literature indicates that there hardly is any commitment to labour internationalism (Table 2-2):

Table 2-2: **Indicators for a Lack of Commitment to Transnational Action**

Indicator	Observed in Country	Author
EWC representatives give supranational activities <i>low priority</i> in comparison to local shop steward duties	Denmark	Knudsen (2004)
<i>Lack of resources:</i> time, human	Germany	Whittall (2000, 2007) for Germany, in general underpinned by Tony Murphy, official from the European Metal Workers (EMF) in Bergene (2010)
EWC delegates do <i>not inform</i> the local workforce/national reps about their affairs	Czech Republic Germany	Klemm, Kraetsch, & Weyand (2011)
National reps <i>barely interested</i> in EWC/transnational affairs	Czech Republic, Hungary, Poland, Germany, UK	Klemm, Kraetsch, & Weyand (2011), Pulignano (2007)
National trade unions rather <i>not accountable</i> to their constituency regarding transnational activities	Germany UK	Pulignano (2007)
National trade unions <i>reluctant</i> to engage in European affairs	Germany UK	Whittall (2000, 2007)

Source: own illustration

The above table is not exhaustive, but it portrays that there are not only workers at the level of the company but also labour representatives at the local as well as the national levels who appear uncommitted to international unionism.

While negative individual attitudes are of no help for developing cross-border solidarity, it is arguably even worse if persons with such attitudes are pushed into roles within the trade union movement that demand engagement in transnational matters. Knudsen et al. (2007) have found that trade unions and their leaders may urge representatives towards EWC

membership. Likewise, a member of the Siemens General Works Council and IG Metall remarked that EWC representatives are often individuals who did not get their positions because of their suitability. Rather, since redundancies are considered evil among labour, these people are often promoted sideways for reasons of outdated views or other interpersonal inconveniences at the local or national levels, as often happens in politics (Linder, 2012, personal conversation). Delegates at the European labour level are sometimes not just uncommitted, but are misplaced in their jobs.

In addition to showing no commitment to transnational labour actions, there are representatives in the movement who act more self-interestedly than in the interest of those they represent. Self-interest is destructive to transnational teamwork when it becomes bigger than collective interest. Destructive commitment is present at the individual, local and national levels.

National representatives in the automotive sector often suspect EWC members of exploiting their positions for opportunities to travel instead of promoting local interests (Klemm et al., 2011). While it is highly questionable that the purpose of an EWC should be to promote local interests, many EWC delegates indeed enjoy labour internationalism more for the business trips, as Bergene (2010) as well as an ETUI EWC trainer confirm (Demaître, 2013, personal conversation).

That EWCs are often (mis)used for local interests is underpinned by Hancké (2000: 53) and Whittall (2000: 80). As to the former, the "EWC [was] primarily a means for obtaining information which can be used in the individual home plants, often against the other plants in the company". In the BMW/Rover EWC case, "both British and German actors remain[ed] heavily immersed within their national systems". Bernaciak (2010) shows, likewise, regarding German-Polish collaboration, that, however reciprocal a transnational teamwork was, it was typically based on mutual economic interests resulting from a cost-benefit analysis. In other words, it was local self-interest that motivated these actors to reach across borders. Before Rudi Kennes' time, also the GM EWC had been a space dominated by local self-interest (Bergene, 2010).

In addition to destructive commitment to cross-border solidarity in micro terms, we can also find parasitic individual behaviour at the national level. Rudi Kennes, while Vice Chair of the GM EWC, points at "two parasites of [Belgian] unions who are pretty nationalist [...] they don't even take part in national strikes here – why should they strike about international issues? [...] And so, they try to undermine [us]" (quoted in Bergene, 2010: 182).

Klemm et al. (2011) have found that the major reason that German employee representatives engage in transnational collaboration is to gain a correct picture of the situation at other production sites, as management often deliberately misinforms them. Underlying this behaviour is, on the one hand, the fear of losing the competitive struggle for production

volumes against their cheaper comrades in the CEECs (also Bernaciak, 2010, 2011). On the other, it is the effort to counteract the erosion of the German model of social partnership and capital mobility.

Applying the results of Fehr and Gintis (2007), even a small group of selfish people has the power to thwart cross-border collaboration unless those who wish for teamwork are given suitable means to punish those who behave opportunistically. What such punishment could be needs further investigation.

Constructive commitment to labour internationalism can be exemplified through the ITF Global Action Day Campaign for road transport workers outlined by Urata (2011) as well as the case of SINTRAEMCALI in Colombia. In stark contrast to the Danish EWC representatives Knudsen (2004) has described, many activists as well as rank and file members in road transport considered the ITF Action Day part of their profession (Urata, 2011) since it was about "bread and butter issues" (ibid: 68), i.e. issues which concern all workers in a certain job regardless the country or region from which they come. These issues arise because the work's nature is global.¹⁸

What the transport workers had apparently not realised was that the increased stress at work caused by tightened employment conditions was neither an individual nor a national problem, but that colleagues in countries around the world have been affected equally. Workers felt alone and isolated before the Action Day series started on 9th June 1997. Now, they are conscious of their common issues and can share their pain across borders: "our rank and file members are now aware of the need for international solidarity action against globalisation", an official of the Bangladesh truck drivers' federation proudly stated (cited in Urata, 2011: 58). On the day of the event, plus in education events before, workers may meet comrades from different countries. On the day itself, simultaneous activities create a sense of unity among the multinational participants.

In South Africa, "the Action Day campaign has become part of a culture. [...] The activists [there] are familiar with the timing of this annual campaign day [and] ready to start thinking about the activities to organise on the day a month before the event", a South African unionist illustrates (quoted in Urata, 2011: 62). Starting preparation only a month ahead sounds quite debatable from a project management perspective, and the ITF starts preparations at least at the beginning of a year for hosting this mid-October spectacle. Most importantly, however, while activists reveal that they enjoy organising these events, the rank and file enjoy participating. People are "willing to get involved and look forward to the next event" (Urata, 2011: 68). It is certainly this positive experience and those good memories that nourish both

¹⁸ In regards to transport, it is predominantly fatigue and safety. While rest time has diminished, duty periods have increased notably as a consequence of companies' global, highly competitive and therefore sought cost-efficient supply-chain management. Some activists feel even proud to be involved in the organisation of this annual event. Possibly, this is also why it has gained considerably in both prominence and participation over the years.

activists' and workers' intrinsic motivation to commit constructively, probably not only to this event but to others also organised by the ITF. Such an inner desire to do things on the basis of joy and righteousness evolves freely, without external pressure (Pink, 2010).

Notwithstanding the success of international campaigns like the ITF's Action Days, which advocated 'Fatigue Kills' and 'Safety First' campaigns, they still fall short of addressing collective concerns. In line with the history of international solidarity, collectivism has been attached to the 'workers of the world'. What about the 'humans of the world'? In other words, the ITF's campaigns address workers, but not human beings. The ITF addresses global labour but not humanity.

However, for constructive commitment to become a sustainable form of NLI, one that takes a broader approach away from a mere labour movement towards more a social one, it is not enough to base international campaigns on workers' interests and ideologies, even if these are shared worldwide. The supreme discipline of workers, their representatives and organisations appears to eventually connect all workers' transnationally common issues – not only 'bread and butter' – with global problems that workers share with the wider population. Since we are all living on the same planet, labour must link the short-term goals of people to the long-term goals of humankind.

The Colombian union SINTRAEMCALI appears to march along this supreme route. They have not only connected their labour struggles to global human rights issues, but their case pictures how personal ideology, emotions and self-interest create a "sense of love" and "sense of duty" (Sayer, 2011: 124/5) that can be combined to create constructive individual commitment to transnational union collaboration.

A "hard core of members and supporters" has "a strong ideological commitment to the union's objectives and to broader processes of political change within the city and country" (Novelli, 2011: 156). Strikingly, this commitment can come at the risk of personal freedom and life. Between 1992 and 2004, 16 leading unionists were killed while many others survived assassination. Others were arrested or forced into exile (Suhner, 2004). Nearly every day, SINTRAEMCALI receives some sort of threat, particularly after protest actions. Family members may also fall victim to harassment (ibid). Notwithstanding this large mental burden, "people had lost their fear, or at least had learned to manage it" (Novelli, 2011: 157). What sprung therefrom is a commitment from the heart and soul to defending the public goods of water, electricity and telecommunication from privatisation.

Importantly, the President of SINTRAEMCALI remarks: "You cannot buy this kind of loyalty, but you must construct it" (quoted in Novelli, 2011: 156). Like the ITF in Urata (2011), Luis Hernandez constructs it through making his constituency feel the strength of the union and that the organisation defends not only their members' interests but also public property. The President, therefore, leads by example. Despite his and other workers' forced redundancies by

government after a 4-day strike in May 2004, he has apparently not lost his faith; he is determined to continue fighting for his colleagues and keeping EMCALI a public enterprise (Suhner, 2004). Besides that, Hernandez has put activists and the local community through a mutual process of continuous emancipatory political education à la Paulo Freire (1973, 2002) in an effort to gradually raise the workers' as well as people's critical consciousness ('conscientização') (Novelli, 2011; Suhner, 2004). "None of this, however, happens overnight" (Novelli, 2011: 160). As noted earlier, it "requires radical and fresh thinking [as well as] a new openness to engage beyond 'bread and butter' issues" (ibid).

2.4.1.5. Factors That May Foster Constructive Commitment to Transnational Action

2.4.1.5.1. Power

With the above examples in mind, it follows that the individual perception and evaluation of power is important for developing commitment to international solidarity. According to Kelly's (1999) adaption of McAdam's (1988) mobilisation theory, this includes personal efficacy as well as the assertion of rights. Likewise, Gamson (1995) and Klandermans (2002) posit agency and efficacy as crucial when it comes to movement participation. This means, on the one hand, that for labour representatives to commit to transnational teamwork they need an optimistic attitude. They might think along the lines of 'I can make a difference; I have the power to change something, alone as well as together with others'. On the other hand, unionists require confidence that they are entitled to take action, either by law and/or because of individual or collective values – in other words, because of formal and informal institutions and hard and soft regulations.

Karl-Petter Thorwaldsson, President of the Swedish Trade Union Confederation, shares these powerful feelings: "As soon as I began my union work in the early 1980s and got a taste for what it meant to be active, I felt you could improve people's conditions considerably by getting involved" (Wallin, 2012). By contrast, an official of a Czech labour federation appears convinced of labour's collective powerlessness vis á vis global capital: "we cannot prevent capital relocation; this is a naïve perception; this does not work" (Klemm et al., 2011: 117 author's translation). A Hungarian works council member in the automotive sector is likewise of the opinion that the CEECs are only "transit countries" on capital's way to Asia, particularly China and India (ibid: 118). Even the ITF has given up hindering capital from moving to low-cost countries, shifting the focus of their FOC campaign from attacking the FOC system to improving conditions on FOC vessels (New Unionism Network, 2013).

For a German representative from the textile and garment industry (quoted in Bergene, 2010: 233), however, it seems not as evident as for these Eastern European colleagues that labour is hopelessly doomed. In fact, he seems to believe that international solidarity may be

a suitable means to curb the relocation of production to countries with ever cheaper resources, and he seems anxious to implement this. At the same time, he appears to feel alone with this inner desire: "we have more chiefs than we have troops and we cannot obtain solidarity just with chiefs; we need more troops". Therefore, his perception of the efficacy of both himself and the labour movement sounds, overall, rather low.

2.4.1.5.2. Pace

In addition to power, the perception of pace appears vital for cross-border solidarity to evolve (Stavis & Boswell, 2008). Pace relates to the evaluation of speed and, thus, time. If a process moves on too fast in our opinion, we are likely to feel discomfort. This may include fear of losing out or resentment if our capacities and resources do not allow us to keep up. If we feel a process moving on too slowly, we might be anxious about missing out or feel resentment because our capacities and resources do not actually allow us more. If the speed of a process is perceived as just right, we usually feel comfortable and, therefore, happy and fulfilled. Thus, in order for labour representatives to commit to cross-border collaboration constructively, they need to see the pace as suitable, on the one hand. On the other, they need to evaluate transnational teamwork as urgent. Delegates might use this conviction to overcome personal barriers that stop them from feeling comfortable with a quicker process.

Unionists might evaluate transnational labour collaboration as urgent if they want to swing the 'sword of justice' (Flanders, 1970) against labour imperialism and improve employment and social conditions in developing countries. Representatives from more advanced capitalist nations or comparably stronger countries might want to do this not only for the sake of fellow humans in poorer areas but also to meet a 'vested interest' (ibid) and considerably reduce capital's incentive to move production elsewhere for the purpose of merely exploiting the cheaper living and working conditions of a workforce abroad. The representative from a developing country or comparably weaker nation might want to act in order to force both indigenous employers and foreign investors to make use of national resources more equitably. This would not only contribute to increasing the quality of local human life but also be a stepping stone towards independence from inter-governmental development aid. As a result of mutual support and learning, both representatives would make an effort to decrease national as much as international injustices and, therefore, peace between workers and other inhabitants of the world.¹⁹

¹⁹ Increased peace between the world's people would, however, not be welcomed by the national military industries. Their legitimization is based on international war and espionage as well as protecting the wealthy elite from the masses they exploit.

2.4.1.5.3. *Injustice*

Following McAdam's mobilisation theory, the feeling of injustice is at the heart of a commitment to standing up and initiating change (Kelly, 1999; Klandermans, 2004; Kriesi, 2008; Tarrow, 1998; see also Abbott, 2011; Friedman, 2009; Goodwin & Jasper, 2007; Hunt, Benford, & Snow, 1994; Knudsen et al., 2007; McAdam, Tarrow, & Tilly, 2004; van der Linden, 2008). Gamson (1995), Taylor and Whittier (1995), Melucci (1996), Polletta and Jasper (2001) and Klandermans (2002), likewise, consider injustice an essential factor for people to take action. This kind of 'hot cognition', as cognitive psychologists call it, not only entails intellectual evaluation about what is equitable (Gamson, 1995) but is likewise laden with moral emotions that "put[] fire in the belly and iron in the soul" (ibid: 91). Goodwin et al. (2004), as well as Abrams (2011), suggest, furthermore, that indignation and pride are key in movements of the oppressed. Building on Jasper (1998), Abrams (2011) highlights that emotions in social movements can be distinguished generally as 'reactive' (e.g. injustice, indignation, anger, outrage) and 'reciprocal' (respect, affection, trust, hope).

Given this, constructive commitment to cross-border union collaboration requires that unionists hold that something – a situation, an event, an action – is inequitable, unfair or illegitimate (Gamson, 1995; Kelly, 1999). This might especially concern the uneven pace of globalisation and the rich-poor divide that it causes between countries of the Global North and West in comparison to the South and East (Bieler & Lindberg, 2011a; Bieler, 2013; Stevis & Boswell, 2008). In the Renault-Dacia case, both French and Romanian workers realised similar structural divides within Europe (Descolonges, 2013).

Based on such conviction, workers' representatives in the more developed and developing countries could initiate and engage in actions that help each other improve their organisation, mobilisation and political power, to be better able to counter not only foreign and indigenous capital (Moneta, 2001), but also the socio-economic and political structures that create and reinforce inequalities between and within nation-states as much as regions. On the other hand, workers' representatives need to feel, throughout their bodies, the mobilising energy and moving power that such a judgement of injustice can provide. At the same time, we must take into account the abovementioned issue of the perception of power. This means that, for injustice to have a mobilising effect, unionists must be convinced that the injustice is due to the agency of another human hand instead of an act of nature or the universe that is beyond control (Gamson, 1995; Kelly, 1999; McAdam et al., 2004).

"Though emotions can be a potent source of mobilization, and provide resource for cohesion and strategy," however, "they can also contribute to demobilization, division, and fatigue" (Abrams, 2011: 589). Therefore, contrary to Gamson's (1995) understanding of the sources of injustice, it appears vital to note that this feeling must not originate from negative, low-energy ('reactive') emotions like fear, anger, grief, guilt, shame, hatred, greed, depression

or resentment towards self or others. The destructive energy that such negative emotions can conjure is portrayed by terroristic and other militant movements. In order for commitment to become constructive, the response to injustice must stem from a space of positive, high-energy ('reciprocal') emotions, such as compassion and love, empathy and sympathy, pride and strength, enthusiasm and satisfaction, joy and happiness.

Constructive commitment also requires (pro)-actively positioning oneself not just against something or someone, but rather *for* a viable alternative to the status quo (as exemplified by SINTRAEMCALI in Novelli, 2011). A recent statement by Konstantin Wecker, a prominent German musician, composer, actor and author, illustrates this point. In support of the EPSU's transnational 'Right2Water' campaign, he advocates the view that "to privatise water has so far been the biggest injustice that the neoliberal ideology has come up with. I love being part of the European Citizens' Initiative and stand up for making the human right to water a reality" (EPSU, 2013 author's translation).

Eventually, both personal interests and ideology as much as emotions define the basis for constructive commitment. In other words, for labour to develop constructive commitment to international solidarity, unionists at all levels must be able to build mental bridges between individual-immediate issues and collective-continuous concerns and recognise how both areas complement each other. This is, in fact, what the ITF evidently managed doing when it made truck and train drivers around the globe aware that they all share the same problems because of a lack of rest. This ability to create connections is surely one of the major reasons to explain the advanced stage in labour internationalism of the ITF compared to other organisations and sectors.²⁰

In sum, mobilisation requires a perception of injustice, power and pace. People are likely to take action if they consider something unjust, if they have the means to change injustices and if their actions will bring about changes in an acceptable time.

2.4.1.6. Factors That May Hamper Constructive Commitment to Transnational Action

The reasons which may stop workers' representatives from committing to international solidarity more constructively are of both an intrinsic and extrinsic nature. Regarding the latter, Knudsen's (2004) study indicates that transnational labour representatives may become demotivated from attaching higher priority to their European roles if they feel that local work colleagues have no understanding of their supranational work, if they perceive no support from local shop stewards or if not enough resources have been allocated by the national trade unions for EWC activities. Additionally, EWC meetings may not be something to look forward

²⁰ "In airlines, many ITF affiliates have resisted the development of effective transnational networks" (Lillie & Martínez Lucio, 2004: 173). This discrepancy within the ITF needs further investigation.

to if different interests, languages and ways of thinking create a conflict-laden environment where decision-making seems cumbersome and outcomes are perceived as unsatisfactory (Demaître & Jagodziński, 2011). Klandermans (2004), similarly, notes that a dearth of gratification can undermine commitment.

In other words, labour representatives' motivation to commit to cross-border unionism constructively may decrease if they feel no or only little appreciation for transnational work, if they lack the right tools and if they find this work everything but fun. These findings correlate with Herzberg's (1987) motivation theory, which shows that, amongst other factors, company policy and administration, relationships with peers, a lack of recognition as well as the work itself can cause extreme dissatisfaction.

In terms of intrinsic motivation, unionists might simply lack self-interest. They might not be convinced of the opportunities for labour that joint cross-border decision-making provide. Given that labour internationalism has been dominated by economic arguments so far (Munck, 2002; van der Linden, 2008), and rational-functional reasons (Ghigliani, 2005; Kotthoff, 2007), it seems unreasonable to assume that the majority of unionists are not interested in it. Rather, since ideological factors like values and morals have been widely neglected, workers have difficulty perceiving transnational teamwork as meaningful. Thus, their human need for self-fulfilment is not nourished while their human drive for purpose (i.e. to contribute to a higher good), is demotivated (see Bratton et al, 2010; Moss Kanter, 2013; Pink, 2010).

A lack of values and general principles as guides for behaviour can also cause feelings of a loss of control and increase confrontation with others while decreasing one's perception of self-worth and efficacy (Stryker & Burke, 2000). As a consequence, representatives are probably unsatisfied with their transnational roles because they neither support their personal development nor make them happy (see Fisher, 2010). Since we spend most of our waking hours at work, our professional positions influence our process of *becoming* immensely. Arguably, most of us are in search of opportunities and spaces that allow us to do what we love, be who we truly are and enjoy being that.

A paradigm that acknowledges people as whole and aims at supporting them in their personal growth has, hence, newly arrived in management literature and practice: the spirituality movement. Business leaders of Intel, Coca-Cola and Boeing, for example, are using this movement in an effort to increase individual productivity and performance and, therefore, organisational success (Karakas, 2010). What is called 'workplace spirituality', 'spirituality at work' (Fairholm, 1996; Karakas, 2010) or 'spirit at work' (Kinjerski & Skrypnek, 2004) means, for (union) leaders, ensuring that staff are "engaged with passion", "alive with meaning" and "connected with compassion" (Karakas, 2010: 98). Given that international solidarity has, so far, remained severely underdeveloped and utilised for largely self-interested reasons, the vast majority of workers and their representatives lack in all three concerns. At the same time,

union management lacks in what Fairholm (1996) describes as 'spiritual leadership'. Together, labour as a whole lacks in an ideology to live up to and, therefore, also in a constructive commitment to transnational labour collaboration.

A lack of commitment, as well as any unconstructive form of it, can, however, have even more extreme consequences than merely preventing cross-border unionism from innovating. As Sayer (2011: 125) posits, "a person who lacks any commitments lacks character; they are likely to feel rootless and lost, and have little interest for others". While unionists may have commitments outside of work, Sayer's statement may tell us, nevertheless, those who lack constructive commitment to transnational labour representation are missing character in their professional roles. Simply put, these representatives are no transnational workers' representatives yet.

2.4.2. Perception/Composition of Self

Since commitments form our character, identity and conception of self, according to Sayer (2011), these three factors in turn influence our commitments – and, hence, labour's commitment to collaboration across borders. Polletta and Jasper (2001) argue, likewise, that identity building and maintenance is necessary for sustaining commitment. As a matter of space, 'character' and 'conception of self' are only be touched upon briefly in this research. The focus of this section is on the matter of identity, since identity has been neglected in the industrial relations discipline (Bridgman & McLaughlin, 2013).

2.4.2.1. Character

Our character is given to us genetically and built over our lives through social experiences (family, education, workplace, etc.). Thus, there are two kinds of mutually influencing character, one of which is individual-biological and the other collective-social. The former springs from the human psyche ('psychogenetic') whilst the latter originates in social interactions ('sociogenetic') (Elias, 2000). Investigating the individual-biological character of commitment goes beyond the author's field of study. Therefore, the collective-social character will be the focus here. Negt's (1974) suggestion to include social psychological concepts in trade union education highlights the importance of collective-social character. However, psychological explanations have been deeply despised by trade union officials throughout history (ibid).

The term "collective character" was coined in 1939 by Norbert Elias (1897-1990) as 'social habitus'. Erich Fromm (1900-1980), the German-American social psychologist and early member of the critical Frankfurt School, termed it 'social character'. Social character is a "mode of thinking and acting" (Pannekoek, 1936) that makes up part of a particular group of people, be it a society, social class or other form of community. Arguably, emotions are part of social

character too. This collective mode of thinking, feeling and doing is moulded by the socio-economic structures that the group members have created, in addition to natural structures. Social characters can both reinforce and challenge socio-economic structures.

The idea of social character acknowledges that human beings are interdependent in satisfying their needs and pursuing their desires. The aim of social character is, hence, to establish rules as to how people are supposed to interact, i.e., socially proper behaviour. Critically speaking, the purpose of social character is to help a group of people function and secure the power of the social elites through rather subtle mechanisms.

Fromm argues that in a society which is organised and reproduced on the basis of capitalism – which, today, most of the world's societies are – several types of social character have evolved. Three of them appear particularly interesting for the purpose of the thesis: the 'necrophilic', the 'authoritarian' and the 'productive' character (Fromm, 1966, 1974 cited in Daniel, 1981). Necrophilia literally means 'love for death'. This type of character is particularly aggressive and destructive and is often rooted in an emotionally perverted sense of what love constitutes (Freire, 1973, 2002).

Authoritarians perceive the world dichotomously through the lens of either power or powerlessness. People that have adopted the demands of an authoritarian social character see themselves as part of it because they accept that their own wishes and interests are subjugated to external powers. Although authoritarians may strive for a balance of power, they do not seek liberation from oppressive forces as such. Rather, they move from oppressor to oppressor and maintain their surrender and suffering. Bluntly speaking, authoritarian characters change oppressors rather than changing their fairly limited, mechanistic perspectives.

There are occasions, however, when the authoritarian may attempt to become an oppressor. Building on the observations of the Austrian psychologist Frankl (2006), the drive to change sides depends on how severely the authoritarian feels oppressed: the more extreme a person perceives oppression, the more that person desires liberation.²¹ In other words, the more that the authoritarian is bent by external forces, the more the individual strives to eliminate this power by internalising it.

On first consideration, the necrophilic and the authoritarian social characters may appear somewhat different. In fact, while the former has a sadistic tendency to dominate and oppress, the latter is characterised by a masochistic drive to submit himself to oppression. Both exert destructive power, though: while the necrophilic steers it predominantly towards others, the authoritarian targets it mainly on the self. Moreover, both the necrophilics and the authoritarians are dependent on outside objects for defining themselves and their personal

²¹ Frankl (2006) experienced both himself and fellow prisoners in the Auschwitz concentration camp, where they were exposed to extreme physical and mental stress. After their unexpected liberation, he observed some inmates who offloaded the inner pressure they had been accumulating over the years of brutal domination in a similar aggressive and destructive way on their outside environment.

identities. Without something external to relate to, their inner loneliness and self-abandonment becomes visible (Daniel, 1981). Both characters are, therefore, prone to suffering from a 'fear of freedom' (Fromm, 1966 cited in Daniel, 1981; Freire, 1973, 2002). Where "the oppressed [authoritarians] are afraid to embrace freedom, the oppressors [necrophilics] are afraid of losing the "freedom" to oppress" (Freire, 2002: 46). So, both characters fail to strive for liberation, autonomy and taking responsibility for self and others (Freire, 1973, 2002). In other words, rather than fighting labour's oppressing structures, both types maintain them.

What might be the antidote to the necrophilics' and authoritarians' destructive ways of thinking, feeling and doing? Building on Fromm (1974 cited in Daniel, 1981), necrophilic and authoritarian characters would need to convert to biophilia. In other words, individuals' 'love for death' and 'love for subjugation' must be transformed into a 'love for life'. Biophilia is what the 'productive character' is based on.

Biophilics, or 'productive characters', are compassionate towards self and others. They have internalised a 'can-do-attitude' and direct their view ahead towards the future instead of backwards towards the past, yet live in the present moment. Biophilics embrace change and are not afraid of making mistakes, but, rather, develop through them. They put 'Menschlichkeit' (humanness) first and appreciate what Mother Nature and Father Heaven have created. Their way of thinking, feeling and doing is, hence, organic and process-oriented ("lebendig, prozesshaft") rather than frozen and fragmented ("erstarrt und zersplittert") (Senf, 1982: 23). Through their holistic perspective, productive characters feel the desire to make complete as opposed to tearing apart.

This social character would, furthermore, not hide behind what another early writer of the Frankfurt School and student of Sigmund Freud, Wilhelm Reich (1897-1957), called character armour ('Charakterpanzer') (Senf, 1980). Instead, productive characters enjoy to *leben und erleben* (live and experience) by being open to forming sustainable symbioses with other human beings as well as the environment in the pursuit of personal fulfilment and freedom.

How may the concept of social character help to explain the commitment to transnational labour collaboration? Social characters exist at all levels of the labour movement. These collective characters influence not only actors' perceptions of transnational teamwork, but their feelings towards and decisions about it as well. Depending on their social character, workers and their representatives may have different or the same ideas about (in)justice, equality, democracy, power, compassion, duty, freedom, oppression, courage, etc.

Answering the question of what forms of social character are present in the labour movement and in what ways they are equal and differ requires further research. However, considering labour's slowness to utilise and improve cross-border action to liberate workers from capitalist oppression and exploitation, the predominant social character among the global labour movement appears authoritarian. Negt (1974) underscores that the majority of workers

portray a resigned and dichotomous way of thinking typical of Fromm's authoritarian character.²² For fruitful transnational teamwork, more productive, biophilic social characters among the European and international labour movement seem urgently needed.

2.4.2.2. *Personal Identity*

Corresponding to the two types of character – individual-biological and collective-social – we also need to distinguish between personal and social identity. Social identity shall be discussed in the subsequent section. Therefore, at issue here is personal identity.

Scholars appear divided about the definition of personal identity. According to Bratton et al. (2010: 116), it is 'the ongoing process of self-development through which we construct a unique sense of ourselves'. Polletta and Jasper (2001: 298) point similarly to 'the bundle of traits that we believe make us unique'. These traits are what Bratton et al. (2010) would, however, distinguish as 'personality'. All of these researchers seem to agree with Pries (2013: 25) that personal identity is 'a complex interplay of perceiving, interpreting, negotiating and defining'.

In brief, personal identity is the definition of self. It is a "reference point from which [people] are able to make sense of the world and their place in it" (Gretchen Fox in Bratton et al., 2010: 117, also Melucci, 1996). In other words, personal identity creates meaning for our actions and beliefs. Yet, it has remained "an underanalyzed level of the self" (Hitlin, 2003: 118).

Defining oneself serves to answer a question that is not only fairly philosophical but also very intimate and challenging for every human being: who am I? The deliberation process involves the mind, heart and soul which correspond, respectively, with 'rational calculation', 'affective bonds' and 'intuitive capacity' (Melucci, 1996: 66). Hitlin (2003) advocates that commitments to certain values are core to personal identity formation. Thus, personal identity seems to originate from certain knowledge, attitudes and roles that either nature has pre-determined or that we have chosen individually and collectively within our man-made economic-financial, political-institutional and socio-cultural structures.²³ As Pries (2013: 25)

²² Negt (1974) points to early childhood socialisation that makes children of working class families more prone to develop authoritarian behaviour, disconnected thinking and conformity. Dera (2006: 22) adds that the education process to make people function within the economic system continues through vocational training. Young adults learn that decisions are made through hierarchy and the power of private ownership, instead of democratic participation. In this way, young workers are trained to submit to authority and accept subjugation as normal. Through this learning process, which is lifelong - unless employees emancipate themselves - workers usually develop authoritarian attitudes. At the same time, already the young worker learns that the principles of the political and the economic world oppose each other. Where he is supposed to be a democratically active citizen, on the one hand, his role as compliant employee is passive, on the other hand. The worker may attempt to endure his inner conflict through pseudo-rationalisations like "it has always been this way" and "it will always be this way" (author's translation). Trade union education may help workers become aware of this.

²³ There appears a debate among academics on the level of how much identity is indeed chosen. While Melucci (1996) would support choice theory proposed for instance by Glasser (1998), Kohler (2006: 4) and all others who contend that "Identity [...] is rarely freely chosen and all too often externally imposed as a mechanism of social

puts it, identities are “outcomes of external opportunity structures [and] internal self-awareness.” In other words, identities involve matters that are both visible and invisible to self and others.²⁴

As the above definition implies, personal identity formation is not a static but, rather, a dynamic process. In this process, the definition of self can change over time and space, because it is continuously challenged and nurtured through the experiences made. In short, ‘identity shifts’ (McAdam et al., 2004) are possible. Relating to Pries, how substantial these shifts are depend not only on outside opportunities and constraints but also on the person’s inner strength and capacity to resist or follow outside forces.

Given the fluidity of identity, labour representatives’ personal identity can vary. As regards political orientation, Stevis and Boswell (2008: 33–34, 37) draw a framework of (aggressive) particularists, multilateralists, internationalists and (liberal/socialist) cosmopolitans.²⁵ In terms of globalisation, unionists might, for example, identify with being a hyperglobalist, sceptic or transformationalist (Held & McGrew, 2003). Regarding Europe, they may consider themselves rather Euro-pessimists or -optimists (Whittall, 2000). In adapting Lévesque and Murray (2010 in Pulignano et al., 2013), unionists might see themselves concerned with transnational union collaboration as isolated defensivist, risk reducers or proactive solidarists. Correspondingly, they could follow the lines of labour imperialists, oppressed victims or, constructively, committed labour collaborators. Taking Bernaciak (2010, 2011) and Whittall (2000) into account, a tendency to be a corporatist or adversarialist appears among management and labour comrades. Interestingly, Fehr and Gintis (2007) observed, similarly, that in a human community, usually, a majority of reciprocators transact with a minority of self-interested loners.

control” would clearly not. Of course, there are many mechanisms of social control, but the extent to which we let us be controlled by them is definitely a matter of individual choice.

²⁴ What is visible to self and others can differ. This is illustrated by the ‘Johari Window’ which suggests open, hidden, blind and unknown areas of self and others. The Window was introduced by Joseph Luft and Harry Ingham in 1955. The two US-American psychologists developed this model initially to better understand group dynamics and their room for manoeuvre. Essentially, it is a test for individuals to train their awareness of self and others. It may, therefore, be used as a tool for both personal and team development, for instance, in terms of interpersonal relationships, communication, collaboration and empathy.

²⁵ Particularists would include “extreme nationalists”, “imperialists” and “predatory neoliberals”. In general, “people who privilege certain categories of nature or people at the expense of others”, like Thatcher and followers, for instance (p. 33). Multilateralists would not mark others as inferior but would not want to share the comparably higher strength of their group or state either. An example is Karl-Petter Thorwaldsson, President of the Swedish Trade Union Confederation. His view is in fact multilateral, yet within a rather limited geographic area, namely Scandinavia: “We are among the world’s most competitive countries, and if we could share our strengths we could become a cutting edge region” (Wallin, 2012).

Internationalists prefer world integration to increase, appreciate cultural diversity and believe in global governance to achieve this, such as many human rights advocates would do (Stevis & Boswell, 2008). The ideal of cosmopolitans is global citizenship. Whilst they would accept cultural variations, they would not accept the predominance of nationality and geographic boundaries. All humans are the same due to the same race, in their view. However, while liberal cosmopolitans would not see any problems in the rising gap between rich and poor humans, socialist cosmopolitans would argue that global citizenship presupposes more equality between us. Therefore, Stevis and Boswell (2008) argue that liberal cosmopolitans are no democrats. “Global union politics is moving between nationalism and multilateralism with internationalism being less prominent and cosmopolitan even less so” (ibid: 153).

Borrowed from social movement theory, regarding protest activities, there may be protagonists, antagonists and bystanders (Snow, 2004): respectively, 'insiders' and 'outsiders' (Hyman, 2011a). In line with this, some workers might see themselves as powerful knights swinging the Flanderian 'sword of justice', while others may, rather, feel like insignificant farmers raising their pitchforks. Still others might not define themselves as (pro)-activist at all but identify more with being a passive-reactive movement participant (Bergene, 2010; Pulignano, 2007). Illustrating the latter, Kotthoff (2007: 175) has found that "as the firm becomes more transnational, the perspective of EWC members becomes more transnational". With a proactive identity, the perspective of EWC members will become more transnational before their company goes global.

Looking at the labour movement in connection with society, unionists might identify with being more reformist or non-reformist (Gorz, 1967). The former would deliberately seek "a new order of priorities, a new model of consumption, of culture, of social collaboration [and ...] construct a society in which production is a means and man is the end" (ibid: 18). The latter would support oppressing social, economic and political structures and does not aim at the emancipation of labour and the humanisation of society.

2.4.2.2.1. Transnational Personal Identity

A particular form of personal identity that corresponds to transnational collective identity appears promising for fostering cross-border union collaboration, and this is transnational personal identity. According to Chaney (1979: 209), this means having one's "feet in two societies". This definition appears quite limited, though. Building on Kearney (2000), Park (2007: 204) proposes, thus, a "simultaneous occupancy in multiple locations crossing national borders". Today, transnational personal identity, arguably, means having one's feet in *at least* two societies.

The logic behind transnational personal identity is, hence, not 'either or' but 'as well as', 'multi-level and multi-local' instead of 'coherent homogenous' (Pries, 2013: 23). It means adding to national identity an equally appreciated transnational dimension that can comprise one or more other national identities. It means being culturally hybrid: a person who chooses to live 'with and within cultural difference' (Pries, 2013: 334), who embraces the 'strength of combination' (Beck, 2008: 226), who acknowledges what is general and specific, common and special, or what Pries (2013: 26) calls a combination of 'universalism and particularism'. Through being culturally hybrid, people can overcome boundaries that are both external and internal to the self and make mental as well as physical connections to people and places around the world. Thus, people with a transnational personal identities challenge not only the borderlines of national geographic spaces but also the power of national institutions (Park, 2007).

In the process of becoming transnational, people may become stuck in perceiving a certain 'duality' or 'in-betweenness', as Park (2007) attests to in his sample of South Korean women in America. While these Asian females are physically and rationally present in the US, emotionally they have remained in South Korea. In other words, they have left their hearts and spirits in their country of origin while their minds and bodies dwell in the country of residence. Since 'home is where the heart is', these women do not feel like Korean-Americans but still like Koreans and feel torn between the societies. It is highly unlikely that their rational-physical and emotional-spiritual dividedness makes the women happy since they do not feel whole and complete as human beings.

On the contrary, Ghorashi (2004) attests to what happens if the process of becoming transnational is completed to such an extent that one stands comfortably with both feet in two countries. His Iranian interviewees in America did not express a duality or in-betweenness in identity. They feel as Iranian-Americans, which means "possible to be different and similar simultaneously" (ibid: 336). They still have a national identity, despite having distanced themselves from their home countries.

The same appears to be essential for the success of transnational labour representation. According to the IG Metall EWC expert, EWC members must be enthusiasts who greatly enjoy internationalism and have international competencies, for example through extensive travel or being posted to other countries. They must be open to trying new things, leaving their national corsets and pushing personal boundaries. They must be comfortable with huge fields of uncertainty that different cultures and patchy laws provide. Mastering this uncertainty includes understanding that, in the absence of bulletproof legislation, certain problems may require a political solution instead of a legal one. Moreover, EWC members must have realised that in order to prevent 'whipsawing games', mutual cross-border communication and information is essential. Eventually, EWC work would require a particular type of human being that he calls the 'intercultural transformer' ("interkultureller Wandler") (Rößler, 2015, interview).

Like his union colleague, Dirk Linder, however, Rößler believes that those in EWC roles are not always in the most suitable persons. In addition, many group works council members consider an EWC role a step back in their representative career, because an EWC has less decision-making power (Rößler, 2015, interview). More self-interested people are possibly not the most constructive EWC members.

How, then, can one develop transnational personal identity? German sociologist Ulrich Beck (2008) suggests that cross-border partnerships and friendships, work, life and travel experiences, foreign language skills or simply some international shopping may help. Any activity involving transnational projects and international organisations, dual citizenship, the consumption of world news and other foreign cultural items such as books, (internet) radio, movies, etc. can also be helpful. Park (2007), likewise, proposes cross-border social relations

of family and production, participation in and contribution to public projects that connect communities transnationally, and political and religious engagement in the country of residence; basically, cross-border social relations exist everywhere people from different countries can exchange values, materials and behaviours and may, therefore, mutually influence each other.

Such a place could, for instance, be created by organising and participating in multicultural events like the yearly Dun Laoghaire Festival of World Cultures in Ireland or the 'Karneval der Kulturen' (carnival of cultures) in Berlin. Following the example of Ghorashi (2004), it can also include events created to bring closer the own cultural peculiarities in foreign environments, like the German Oktoberfest and German movie nights, celebrations of the Chinese New Year or the Brazilian Carnival events in Dublin.

From Kohler's (2006) observations at the 5th World Social Forum in Porto Alegre, Brazil,²⁶ international experiences and exposure to different cultures from a young age provide the opportunity to create an "understanding of 'the other'" (p. 10) from early on. Therefore, the advantage would be growing up bi- or even trilingually – for example, as son or daughter of mixed-national couples who have moved to a third country. These enhanced language skills would then facilitate their easier engagement in transnational networks as adults. They might also be encouraged to learn more languages, since people with a transnational identity appear to desire the ability to have an intelligent conversation with others (ibid). Language skills, moreover, open up the opportunity to live and work in different cultures and societies.

2.4.2.3. Conception of Self

The conception of self interrelates with our personal identity and marks a further source for making sense of us persons. It involves "a certain combination of the different needs, wants, desires that constitute our selves" (Melucci, 1996: 66). Obviously, this combination is created, on the one hand, by natural inevitabilities such as the drive to survive. On the other, it is due to individual choices influenced by particular economic-financial, political-institutional and socio-cultural structures. Kotthoff (2007: 170) understands "the constitution of the self [as] self-becoming, self-understanding, self-perception, the core and middle of the personality". He adds, moreover, that it can be "interpreted as an affective as well as a cognitive event" (ibid). This statement reminds again on Sayer's (2011) concept of 'emotional reason'.

In other words, like personal identity, the conception of self is an individual process nurtured by decisions of both the heart and mind. Arguably, like personal identity, the

²⁶ The WSF is probably the world's largest transnational and most diverse get-together demanding that "um outro mundo é possível" (another world is possible). Interestingly, the ITUC is in the International Council of the WSF, as is CES, the ETUC, other national union federations, human rights organisations, environmental NGOs. Other examples are the Paolo Freire Institute in São Paulo, and the Transnational Institute, an academic think tank that researches on more sustainability, justice and democracy in the world. http://www.forumsocialmundial.org.br/index.php?cd_language=2&id_menu=, accessed 11 March 2013.

conception of self, too, has a spiritual dimension where decisions are influenced through intuition. However, whilst personal identity refers to the question 'Who am I?', the conception of self seems to answer the question 'What am I?'

First, we are human beings. Conceiving ourselves as such means, according to the British physiologist Pete Moore (2003), to acknowledge and appreciate us as an 'embodied', 'conscious', 'genetic', 'historic', 'related', 'material', 'spiritual', 'sexual', and 'social' beings. Following this logic, what does it mean to conceive of oneself as a labour representative? More particularly, what combination of needs, wants and desires makes a labour representative regard himself as transnational? The answers to these questions, arguably, go not only beyond the capacity of this thesis but also the author's as well as the field of research in Industrial Relations and Human Resources. They would, hence, need further investigation by more suitable scholars in the areas of psychology and philosophy.

2.4.3. Perception of Others

While personal identity refers to the relation we have to ourselves, social identity is a perceived connection of self to others. We believe that to have something in common with a certain group of people, we need to feel 'sameness' or 'belongingness' in terms of their values, goals or experiences (Bratton et al., 2010: 116). The group can be both real and imagined (Knudsen et al., 2007; Polletta & Jasper, 2001).

However, as opposed to collective identity, we can identify with the group without being or feeling like a group member. In other words, social identity can be sourced from one or more collective identities. For example, we may identify with a certain soccer team, trade union, or multinational company brand without playing, affiliating or working for either of them. Therefore, we can and certainly usually have more than one mental attachment to a specific group of people – i.e., we have plural or "multiple identities" (Bratton et al., 2010: 116; Deaux & Martin, 2003: 105; Timming & Veersma, 2007: 41; Whittier, 2002: 297). We arrive at this kind of 'collective self' through comparisons and self-categorisation (Hogg & Ridgeway, 2003). Social identity seems, thus, a particular area of personal identity that hints at who we are as individuals at a given point in time and what we might want to be as part of a group.

Given this, like collective identity, social identities may be found at multiple levels, such as the local, national, supranational and international. The reach of our sense of belonging can, hence, fall short or long. For example, according to Gamson (1995: 100), "many working class Americans [...] identify with "working people", but have no identification with their union and think of the "labour movement" as something that happened fifty years ago". Representatives whose social identities are not stimulated by collective identities beyond national borders

arguably hamper transnational solidarity because their perception of sameness does not reach globally enough.

One reason that American workers do not socially identify with labour beyond their national borders may be that their identification with 'working people' is in contradiction with their other identities. In other words, in addition to multiple identities, we can also have conflicting, contradictory identities. To ease this conflict within us, we can, on the one hand, withdraw from the 'troublemakers'. On the other, we might balance them out by putting more priority on one identity over another in a particular situation (Bratton et al., 2010). As one ITF staff quoted in Fairbrother (2013: 114) describes it, unionists "can take their local hat off as they go into the meeting and put an ITF hat on".

Another reason for shortcoming in socially identifying with alleged brothers and sisters transnationally may be that workers and their representatives lack imaginative capacity. Since all the workers of the world will never meet face-to-face at least once in their lives, the perception of global labour cannot be sourced by what might be called 'real attachments'. Instead, social identity with labour originates mostly from 'imagined attachment'. As Deaux and Martin (2003: 114) underscore, "social identity can include great numbers of people whom one has never met or will never meet".

For identifying socially, we are required to see others less with our outer, visible eye and more with our inner, invisible eye. For doing so, 'cognitive' or 'interpersonal social bonds' are essential (Park, 2007). Thus, global as much as European labour must predominantly be a 'community of the mind' (Chayko, 2002 quoted in Park, 2007) or 'imagined community' (Anderson, 2006; Polletta & Jasper, 2001) instead of what might be introduced as a 'community of the body' or 'corporeal community'. The imagined community or 'figured world' (Holland et al., 2008) of international labour shall be described as "a deep, horizontal comradeship [based on] fraternity" (Anderson, 2006: 50), or "the international 'brotherhood' of 'man'" (Munck, 2002: 153). Humanity as well as labour is, likewise, a "community of fate" (Jenkins & Turnbull, 2011: 204; Turnbull, 2007: 130) since humans as much as workers have many issues in common. Workers are a part of humanity, and both strive to survive and thrive.

Particular to such 'communities of the mind' is that they are enabled "not by way of their travels and social activities, but through identity practices" (Park, 2007: 207). These identity practices aim at creating a "*sociomental* space" (Chayko, 2002 in Park, 2007: 207 emphasis in original). Arguably, this space would invite thoughts and memories into our minds, emotions into our hearts and images in front of our inner eye. These memories, emotions and images are evoked through an "imagined timeline" (Park, 2007: 211) that connects the past, present and future of, in our case, international unionism. As we will see in chapter 4, the concept of Transnational Competence includes an 'emotional' and a 'creative-imaginative' ability and can, therefore, support identity work.

2.4.3.1. *Solidarity*

Social identity – whether real or imagined – is the basis for social solidarity (Knudsen et al., 2007). This is true because solidarity presumes a perceived relation to other people, more precisely, to rather larger numbers of people (Arnsperger & Varoufakis, 2003).²⁷ If we do not feel in any way connected to other humans, why should we think about their well-being? Why should we make efforts for them although we are, right now, not in a same or similarly disadvantaged situation?²⁸ Why should we share some of our strength to make comparably weaker persons or groups stronger?

The answer is that we may feel a moral obligation to deliberately support those in need without expecting any immediate compensation (Klemm et al., 2011). This moral obligation is awakened through an emotional connection that we feel towards other people who are in a particular situation. Solidarity, thus, is “a form of targeted empathy toward strangers, [...] a reaction to a *condition* which afflicts certain ‘others’ independently of their personal or social character” (Arnsperger & Varoufakis, 2003: 158 emphasis in original). Solidarity is, hence, perfectly in line with the idea of ‘imagined community’ since we do not have to know people personally for solidarising with them.

Due to the moral obligations that underlie solidarity, solidary action is sourced from “a sense of love” for self and others as well as a “sense of duty”; in short, an “emotional reason” (Sayer, 2011: 124/5, 36). Thus, against probably widespread belief, solidarity is not purely altruistic, but it includes egoism too. People who act in solidarily gain at least the contentment of affirming the self. Usually, we hope, trust or even expect that the support we have given is reciprocated a) when we are needy and b) in a form that suits our future situation.²⁹ We might also raise other cost-benefit calculations, because, after all, solidarity is an often public, yet always political act which may have severe consequences (Klemm et al., 2011). These can include social exclusion or another form of death, as we learn from the examples of labour in Colombia, Guatemala, the Dominican Republic and El Salvador (Adanhounme & Lévesque, 2013; Bergene, 2010; Lethbridge, 2011; Novelli, 2011; Sjölander, 2011). Arnsperger and Varoufakis' (2003) argument that we do not expect compensation for acting in solidarity is, therefore, contentious. Rather, the help we hope to receive in return does not have to stem from the person or group we supported previously; it can come from anyone in any form.

The idea that solidarity is composed of both compassion and calculation is in line with Frankfurt's (1971) suggestion of a ‘two-tier deliberation process’. This combination of “mutual

²⁷ Solidarity would usually refer to a bigger group of people whereas altruism or love would be more directed towards single persons or a smaller collective (Arnsperger & Varoufakis, 2003). But is it not also possible to act solidarily toward a single person, for instance, if we sat beside a beggar for some time? Or would we then indirectly solidarise with beggars in general?

²⁸ If the situation is caused by human hand, solidarity may become radical, Arnsperger and Varoufakis (2002) suggest.

²⁹ Expectations can lead to disappointment, anger and resentment when they are not met. Therefore, it is wiser not to expect anything from our actions.

self-interest and a joint ideological basis”, Bieler and Lindberg (2011b: 9) propose, “can pave the way for new types of collaboration”. In fact, however, solidarity seems to include a third tier. Following Klemm et al. (2011: 39 author’s translation), “solidarity involves a cognitive frame (knowledge), a normative orientation (co-orientation) and an empathic connection (involvement)”. In other words, it involves not only the heart (empathic connection) and the mind (cognitive frame), but also the soul (normative orientation). Therefore, rather than a two tier deliberation process, sustainable solidarity appears to be a ‘three-tier deliberation process’.³⁰ Once the deliberations are done, solidarity involves the body for taking action. Thus, solidarity demands all four human elements: body, mind, heart and soul.

Importantly, however, solidarity never arises from the tier of the ego. Although involved (Hyman, 2011a, 2011b; Klemm et al., 2011), it is not self-interest which spurs solidarity. Solidarity originates from the heart and soul, i.e. the “generosity of spirit” (Arnsperger & Varoufakis, 2003: 161). Otherwise put, it is the understanding of certain compassionate values that motivates us to provide empowering support to others; it is not individual and collective needs. (Whether we listen to heart and soul is yet a different story.)

As a result, any form of collaboration that evolves from rational-calculative considerations is not solidarity. Instead, it is what Klemm et al. (2011) define as ‘interest coalition’: based on cost-benefit calculations, the individual or group assumes benefits through cooperating with others. Another term for this is ‘risk community’ (Fetzer, 2008).

2.4.3.1.1. *Types of Solidarity*

Émile Durkheim (1858-1917), one of the founding fathers of modern social science, besides Karl Marx and Max Weber, understood human interaction based on common interests and goals as part of ‘mechanical solidarity’ (Zoll, 2000). For Hyman (2011a, 2011b), this marks a separate, yet unspecified form of solidarity. Mechanical solidarity is based on identification with similar socio-economic conditions (Mückenberger, 2011). The “*attribution of similarity*” (McAdam et al., 2004: 334 emphasis in original) stems from socially constructed commonness through class, gender, education, nation, etc. (Zoll, 2000: 33) and depicts mechanical solidarity as “Solidarität unter Gleichen” (solidarity among equals), while Klemm et al. (2011: 153) call it “Solidarität aus Ähnlichkeit” (solidarity through similarity).

In the past centuries, social classes and gender roles in society were quite uniform. However, due to the capitalist system pushing forward individualism and competition, people as workers, consumers and individuals today have become much more particular in their interests and demands. Because of modern transport, communication technology and economic free trade policies, national borders have become much more permeable. Through

³⁰ We have determined these three tiers as vital, too, for developing constructive commitment. Arguably, solidarity is a form of constructive commitment.

global production and supply chains, workers have become ever more alienated from the products they produce (Mückenberger, 2011; Senf, 2003). Differences between wage and salary earners, men and women, young and old, foreign and indigenous, migrants and asylum seekers are all evident (Zoll, 2000).

Thus, owing to increased individualism, socio-economic conditions are not as common as in previous centuries. As a result of amplified competition and the urge to compare oneself with others, common socio-economic conditions may create envy rather than empathy. As a consequence, mechanical solidarity – a functionalist view of solidary action – is inadequate for enhancing transnational labour collaboration.

Durkheim offers a second type of solidarity which he calls 'organic'. As opposed to commonness alone, solidary action arises, here, from both commonness and difference. Like in a human body, despite their difference and single autonomy, all organs are dependent on each other and interconnected through the blood stream. All organs work together harmoniously and complementarily to create something bigger – namely, a human being. If the organs worked against each other, neither they nor the organism would survive. Due to their interconnection, 'an injury to one, is an injury to all', as much as healing to one is healing to all.³¹ Hyman (2011a, 2011b) calls this 'mutuality despite difference', Fisher and Ponniah (2003) 'universalism of difference' and Zoll (2000) 'solidarity among unequals' (Solidarität unter Ungleichen). The motto of the European Union is, likewise, reflected in organic solidarity: 'united in diversity'.

A further notion which builds on the same idea of human relations between people who are similar and diverse at the same time is that of 'fluidarity' (Maruggi, 2012; McDonald, 2002). Building on unpublished work of the anthropologist Mark Driscoll, Diane Nelson (1999) coined this term to highlight that, while it is hard to give up old ways to construct identifications, today, identities are not necessarily solid anymore but, rather, in flux. Therefore, the definitions of enemies and friends, oppressor and oppressed, insiders and outsiders of the group we identify with are not as clear-cut as they may have been before the industrial era.

For perceiving solidarity as 'mutuality despite difference,' making the shift from mechanic to organic solidarity, the common denominator among and between labour and society must arguably be widened in order to become more inclusive. What unites the currently 7.3 billion individuals on this planet is that we are all human beings. We have the same basic human needs, but we may satisfy them in different ways. We have the same vocation, which is becoming more humane (Freire 1973/2002). Thus, the social identity needed for creating organic solidarity and fluidarity among labour as much as society is "Menschsein" ('being

³¹ 'An injury to one is an injury to all' is a popular motto in the labour movement that was invented by the Industrial Workers of the World (IWW). Interestingly, the other side of the coin is missing, that one success for labour is a success for all workers of the world. The Christian community considers both: "If one member suffers, all suffer together with it; if one member is honoured, all rejoice together with it" (1 Corinthians 12: 26).

human'; Zoll, 2000: 33), "the common fate of humanity" (Hyman, 2011b: 26) or, expressed in French, la "*condition humaine*" (Hyman, 2011a: 66 emphasis in original).

If we all perceived each other as human beings, social identity would turn into collective identity because we are all part of the same group. Such a view of human collaboration presupposes a radical transformation towards humanisation and humanism (Freire 1973/2002). Once we have internalised that we are all human beings, it is only a small step further to also see perceived opponents – e.g., capital – in a different light: namely, likewise as human beings. For Negt (1974), such equality between all human beings would mean a class-less society.

All-encompassing humanism, where classes and castes are redundant, may appear too utopian to some. One step towards making utopia a reality is introducing organic solidarity among the workers of the world. Achieving this appears already a challenge, as organic solidarity would mean at all levels of the movement to end imperialist behaviour. Instead, participatory leadership would guide workers and their representatives to mutually supporting and empowering each other among and between union organisations, companies and supply chains, within and across national borders. Labour would be connected worldwide through network structures that are kept alive through a continuous flow of relevant, open and honest information as well as solidary actions and activities. So far, European as much as international labour seems to have a long way to go before we see organic solidarity as the major praxis.

2.4.3.1.2. Solidarity in the Labour Movement

In fact, solidarity as such appears to lack in the labour movement. Neither mechanical nor organic solidarity seems the common practice between workers in different countries. The desire to collaborate transnationally is motivated least by ideology and emotions and more so by rational calculation. What labour calls (international) solidarity nowadays appears nothing more than a (huge multi-national) interest coalition or risk community (Fetzer, 2008; Ghigliani, 2005; Klemm et al., 2011; Munck, 2002; van der Linden, 2008). As soon as interests are met, collaboration is gone.

For example, even though principles of fairness and equality lay the ground for coordination in GM Opel, the binding rules that the five plants agreed to among each other set out to describe how to "share the pain" and prevent production capacities from moving to the Russian continent (Bergene, 2010; Dehnen & Rampeltshammer, 2011). Apparently, due to the assumed powerlessness vis à vis capital, workers forgot to think about how to 'share the gain'. Dufour-Poirier and Lévesque (2013) have observed in the Euromin case that workers' representatives from Canada, Peru and Chile teamed up in order to defend the jobs in their respective nations and plants. Fairbrother (2013: 109) even explicitly demarks the ITF Working Group at the Port of Melbourne as a "structural mutual interest coalition".

Stuart Howard, Assistant to the ITF General Secretary, advocates the view that solidarity is a rare phenomenon: “generally workers are not wonderfully altruistic people who are always eager to give solidarity – you have to persuade people there’s something in it for them” (quoted in Bergene, 2010: 74). Similarly, a German EWC representative in Klemm et al. (2011: 172) doubts if global solidarity among workers is possible given that only half of his working colleagues usually attend the firm’s general meetings. A Czech labour federation representative admits even more severely: “among us, the word ‘solidarity’ is depreciated and supported by nobody” (ibid: 116 author’s translation). The EWC members interviewed by Kotthoff (2007) perceive, too, that there is no solidarity among labour within Europe and around the world.

It follows that Flanders' (1970) ‘vested interest’ has been present in labour internationalism more than enough while the ‘sword of justice’ has fallen short. Two examples where interests and ideology have seemed to go hand in hand is the case of Renault-Dacia presented by Descolonges (2013) as well as the earlier mentioned case of SINTRAEMCALI.

Why has solidarity so considerably decreased over the century? Apparently, the capitalist system pushing for competition and individualism encourages workers to forget moral considerations and compassion towards others. When ‘whipsawing games’ between production plants are played, “love does not stretch that far”, a EWC member commented (cited in Descolonges, 2013: 176). “The workers in the countries who are going to get the work, sit there and they don’t say a word. And the workers who are losing are banging the table and shouting”, an official of the ITGLWF illustrates correspondingly (quoted in Bergene, 2010: 78). The majority of workers appear to perceive nothing wrong with this, however: “it is totally normal that charity begins at home [...]. Solidarity in its full meaning represents too high a demand” (Kotthoff, 2007: 176).

What strikes one looking at these statements by European and global workers’ representatives are two things: on the one hand, there seems confusion in terminology and, therefore, divergence in understanding. Contrary to the above definition of solidarity, all of them obviously equal solidarity with altruism. That this solidarity, then, is perceived as ‘too high a demand’ does not surprise. Would it be different if workers knew that solidarity, as proposed here, would entitle them to consider their respective interests? Do they, furthermore, miss seeing that ‘something in it’ may also be of an immaterial nature, like the affirmation of self? It is absolutely necessary to care about one’s own well-being since we would not have power to sustain ourselves and help others without doing so. Therefore, charity may well begin at home, but it must not to stop there.³²

The apparent general lack of emotions among workers in the form of “empathy, sympathy and compassion, out of which emerge a corresponding readiness to help” (Kotthoff, 2007:

³² Consider the safety procedures on board of airplanes. Before every take-off, in the case of emergency, passengers are advised to put on their oxygen masks first, before they help their children and others.

176) is especially astounding because the term 'solidarity' and the social identity of 'brotherhood' is not only a historic fundament of the labour movement³³ - it is also still prominent in 'labour talk' today. Does this mean that workers have fooled themselves over the centuries with 'solidarity and brotherhood talk', but have never really meant to live up to it? Have they fooled themselves because a common definition of solidarity among labour does not exist? Only a minority of exceptional people, "*some* intelligent, *some* of the time" (Arnsperger & Varoufakis, 2003: 180 emphasis in original) – whether in the role of worker or member of civil society – seem to behave compassionately towards the self and others, because they follow their hearts and intuition instead of their egos. This would explain to a considerable extent why solidarity among human society as well as labour is in deep crisis (Zoll, 2000).

Conclusion

Chapter 2 outlines the main factors which may foster or hamper labour to engage in successful transnational collective action. It suggests that these factors can be found in structures, organisations and individuals. As to structures, the chapter looks briefly into political-institutional support for workers as well as the impact of cross-border competition on labour collaboration. Moreover, the emerging concept of New Labour Internationalism (NLI) is highlighted. For union organisations, resources are particularly important. People may have a certain form of commitment to collaboration across borders. Also, their perception of self and others influences their decisions to involve themselves in transborder teamwork. The chapter focuses on those factors concerning individuals since not much has been written so far in this regard. Arguably, transformative changes are necessary in all three areas in order to improve transnational labour collaboration, yet particularly in terms of individuals.

Trade union education impacts, first and foremost, on the individual before its effects spill over to organisations and structures. People's decisions may underlie structural, organisational and personal considerations. Action and change is, nonetheless, a matter of agency. The role of trade union education is, therefore, to enlighten individuals on self, others and the context (knowledge) and enable them to take action (skills).

The key ingredients to successful transnational mobilisation is the perception of injustice, power and pace as well as bonding experiences based on trust and compassion for self and others. Therefore, trade union education provides a space for social interaction and the development of particular emotions and values (attitudes). A key attitude is embracing lifelong

³³ It probably evolved in 1864 with the First International and the previously mentioned IWMA. They proclaimed in their provisional reglementation solidarity as the basic principle between workers of all professions within a country and 'brotherhood' between workers across countries (Zoll, 2000).

and lifewide learning – i.e., to choose a life path of continuous development. It follows that education is not a quick solution, but a long-term endeavour.

Much has been written about cross-border collective action, and trade union education has been acknowledged several times as an important factor to improving it (Bernaciak, 2010; Bicknell, 2007; Erne, 2008; Novelli, 2011; Whittall, 2000). However, little has been researched regarding trade union education as such, or its potential and suitability for enhancing sustainable transborder collective action. To start closing this gap, this research project enquires into the extent to which trade union education fosters labour representatives' transnational competencies, and it explores major challenges to achieving this. The analysis of the present chapter 2 is the basis for identifying what education (i.e. knowledge, attitudes and skills) workers' representatives require in order to become transnationally competent.

The following part II establishes the theoretical background of trade union education (chapter 3) and points to a particular educational tool which appears promising for making labour more transnationally competent: namely, the framework of Transnational Competence (chapter 4). Part II will clarify questions such as 'what is the purpose of trade union education?', 'which educational approach is best for enhancing transnational labour collaboration?', 'how can the concept of Transnational Competence be adapted to underpin a radical-emancipatory praxis?', and 'what is the relation between the six transnational competencies and the challenges to transnational labour collaboration?' Finally, the research design section explains the methods and methodology applied in this PhD project (chapter 5).

PART II – ANALYTICAL FRAMEWORK

The second part of the thesis establishes the analytical framework in three chapters.

As argued in the previous chapter, any kind of action boils down to people's choices. Therefore, workers, their representatives and trade union staff need to be educated in the knowledge, attitudes and skills which encourage and prepare them to engage in transnational action. Hence, the theory of trade union education is under examination in chapter 3. Firstly, education is viewed from a legal, economic and philosophical perspective generally. In terms of the latter, five philosophies of education are introduced: namely *liberal*, *behaviourism*, *progressivism*, *humanism* and *radical*. Subsequently, it is shown how trade union education may be implemented in organisations in terms of purposes and programmes and what the challenges to its implementation can be. The aim of chapter 3 is to find categories in order to classify the empirical findings on trade unions' different education and training programmes and compare them across levels, countries and sectors.

Chapter 4 proposes the concept of Transnational Competence (TC) as a specified education and potential remedy to the challenges to cross-border collaboration identified in part I. TC stems from the international business/political science literature and comprises five complementary competencies, which are termed *analytic*, *emotional*, *creative/imaginative*, *communicative*, and *functional*. Since the original concept is insufficient for enhancing transnational labour action, the framework is extended to a *transformative* competence. The extended TC framework will serve as a means to assess and compare the empirical findings of part III and IV.

For detailing how the empirical section is tackled and the whole thesis undertaken, chapter 5 illustrates the research design. The philosophy behind this PhD project is holism. This means that every part is seen as a reflection of the whole. It also means that the thesis allows space for emotions and spirituality in trade union education, since education is presented as a potential force for liberation and humanisation. Because trade union education is an underresearched field and TC an emerging concept, this thesis is more exploratory than explanatory in nature. The research methodology is driven by a multi-level, cross-border comparative case study design, which analyses (transnational) trade union education at European level as well as in Germany and Ireland.

Before we can analyse trade union education at a European level, in Germany and in Ireland, however, we must know more about the theoretical background of (trade union) education, which is the task of the following chapter.

3. Chapter: Trade Union Education in Theory

Education has a double meaning: namely, functional and normative. Education is a fundamental human right, but not all people can exert it. Increasing neoliberal influence is leading to a situation in which education is seen more and more functionally as a servant to economic growth as opposed to emancipatorily for human growth. Participation in adult learning, which trade union education is a part of, is especially low. In the EU, on average, 10.5% of citizens between age 25 and 64 take part in lifelong learning activities (European Commission, 2014a).

The functional and normative meaning of education is interpreted differently in dependence on the underlying philosophical framework. The five major philosophical frameworks of education are *liberal*, *behaviourist*, *progressivist*, *humanist* and *radical*. Each framework makes assumptions about the purpose of education as well as the appropriate teaching and learning style. The liberal and behaviourist philosophies do not advocate learner-centred and active learning methods, which are, arguably, vital for labour mobilisation.

Unsurprisingly, therefore, labour pedagogy is rooted in the progressivist, humanist and radical schools of thought. Relevant for categorising the empirical findings regarding trade unions' and trainers' behaviour are the progressivist and radical philosophy. Constructivist pedagogy and its modern attachment, connectivist pedagogy, have evolved from progressivism, whereas critical-emancipatory pedagogy is a descendant of the radical philosophy. Transformative power has only the latter. This chapter, therefore, proposes that radical educational philosophy from which a critical pedagogy originates is required for trade union education in general and for enhancing transnational labour collaboration in particular.

Depending on the pedagogical approach taken, trade union education can support trade union members in accommodating/complying to existing social, economic and political structures as much as in transforming them. Likewise, labour pedagogy can support people in maintaining as well as transforming themselves as individuals. This chapter suggests that, from the five educational philosophies emerge, broadly speaking, three groups of mind-sets: namely, *Conservatives*, *Reformers* and *Transformers*. All three types see quite the same goals in education: namely, individual freedom and autonomy as well as the survival and development of society. For human freedom and autonomy as well as for improving transnational labour action, however, more Transformers, this chapter suggests, are needed.

The target group for (transformative) education is trade union members. Trade union members can be distinguished in three groups: i.e., organisational staff, labour representatives in the companies, and members without any administrative or representative function. With this framework, labour scholars have identified different types of trade union education: namely, *union education*, *labour education* and *workers' education*. Each type suggests different purposes and providers of educational activities. All three types can provide certain

knowledge, attitudes and skills which, utilised together, are supposed to build a distinct labour culture and offer orientation to act.

As a result of shorter resources of time, money and staff, in addition to union leaders' decisions, trade union education has moved more towards skills and competency training ('ökonomische Zweckschulung', i.e. utilitarian training for economic purpose). The increased commodification of education underpins this development. Transnational topics appear of low concern in trade union education today.

Crucial for revitalising the national and global trade union movements, as well as enhancing transnational labour collaboration, seems to be rediscovering the roots and traditions of trade union education – i.e., growing a distinct labour culture based on critical analysis of present emancipatory debates about utopian alternatives in the world of work and society. International solidarity is one of these visions, as much as the praxis of other central labour values, such as democracy, justice, equality, sustainability, peace and freedom.

Before discussing the role of trade union education in detail, however, we must understand the role of education more generally; i.e., we must understand in the context of economic, political and cultural structures.

3.1. Education: a Right, an Industry and Several Philosophies

Internationally, the United Nations determined, in 1948, that "everyone has the right to education" (Article 26, Universal Declaration of Human Rights, UDHR). In order to put this right into practice, education needs to be 'available' and 'accessible' (Tomaševski, 2001). The UDHR article, hence, proposes that at least elementary education be compulsory and free. In addition, the former UN Special Rapporteur Tomaševski (2001) suggests that education must be 'acceptable' and 'adaptable'. Like most international agreements, however, the UDHR is merely a declaration of principle and, therefore, not legally binding. As a result, millions of children and adults have remained discriminated against: 75 million children cannot access elementary education whilst 776 million adults have never received education and can neither read nor write ("Right to Education - What is it?," 2014).

In Europe, the EU Charter of Fundamental Rights recognises the right to education in Article 14, 1: "Everyone has the right to education and to have access to vocational and continuing training". Thus, as opposed to a global level, the European right is legally enforceable as part of the Lisbon Treaty. The principle of accessibility is not fully guaranteed, though, since free compulsory education is merely "possible" (Art. 14, 2). In other words, people could be forced to attend school and pay for it. Therefore, even basic education can be an obstacle to financially poorer families and more easily accessible to wealthier families.

The increasing marketisation of education contradicts the promotion of education as a fundamental right. The education sector has been under attack from privatisation and

business-inspired New Public Management, where knowledge is sold for a market price and the sector reformed with performance measures: "education [...] is increasingly a traded good within international education service markets and global labour markets" (Apple, Ball, & Gandin, 2010: 7; Ball & Youdell, 2009; McLaren, 1999). In the service economy, education is narrowed more and more to science and technology whilst the arts and humanities are disrespected (Lynch, Lyons, & Cantillon, 2007; Nussbaum, 2006). Pablo Sanchez from EPSU pinpoints the view that "knowledge today is used as a commodity and not as a public good" (CPSU, 2014: 12).

Despite privatising, education can take very different trajectories according to different types of welfare states. Also, social segregation and injustice are likely to increase as a result of school choices and graduation awards that are made in dependence on the families' financial and social background (Alexiadou, 2013). Conversely, schools and universities are encouraged to choose students, as well as teachers, whose performance is assumed to support a favourable school ranking and other internal and external quantitative benchmarks (Ball & Youdell, 2009). External benchmarks like rankings are established to help prospective students and their parents choose, but they are criticised for their quite arbitrary choice of indicators (Erne, 2007).

Ultimately, the increasing marketisation of education changes the roles and relations between the state, learners and lecturers: learners and their parents become consumers, teachers become knowledge producers and the state monitors their performance. The fundamental right to education becomes a duty and the mode of education technocratic, emphasizing rote learning and repetition for passing tests. Due to austerity measures in public finances, big businesses may sponsor learning materials, particularly in primary and secondary education. In this way, companies lay the ground for business-friendly voters, promote a corporate view of the world and create loyal consumers and potential recruits from the early childhood ages (Holland-Letz, 2014).

Negt (1974: 13, author's translation) describes this development as the "technocratic deformation of education", where education in schools and universities is geared towards meeting the needs of production and reproduction as opposed to the human interest in emancipation. Learners are seen "as two-dimensional beings, namely consumers and producers, rather than social actors" (Mayo, 2003: 38).

3.1.1. Etymological Foundations of Education

Although the right to education sounds unequivocal around the world, the meaning of education appears not to be. In other words, human beings have the right to be educated, but what they are educated in and how they are educated may vary extensively. This room for interpretation serves politicians to design school and university education that fits more economic than human needs.

The word 'education' is of Latin origin. According to the Oxford Dictionary, it is derived from the noun 'educatio' (bringing up, rearing) and is related to the verbs 'educare' (train, mould), 'educere' (lead out) and 'educere' (bring out, develop). As we can see, a single vowel that distinguishes 'educare' from 'educere' makes a big difference. The former provides the basis for interpreting education as a means to shape human beings according to certain views of the world which are passed down by particularly powerful people. The latter serves as a foundation to prepare human beings to create and master their own futures (Bass & Good, 2004).

In other words, where 'educare' can be (mis)used to oppress and brainwash people for the service of a powerful elite (top-down domination), 'educere' can facilitate human beings to find their vocation and unfold their full potentials (bottom-up emancipation). 'Educare' can, however, also be interpreted as a means to equip people with the appropriate skills to pursue their vocations.

Education has a functional as well as a normative purpose. This corresponds with Sayer's (2011) notion of 'sense of duty' and 'sense of love' (see chapter 2).

3.1.2. Philosophical Frameworks of Education

The different interpretations of education are rooted in different belief systems and philosophical frameworks. Five frameworks have been socially constructed which guide learners' assumptions about education; more precisely, its definition and aims, the human and the learners' nature, the role of the teacher as well as the way of assessment (Kumar, 2009a, 2009b; Scott, 1998).

3.1.2.1. Liberal

The first framework is called 'liberal', and it originates from classical Greece (for a more detailed picture, see Reeve (2003) and Gill (2003)). The liberal view of education evolved from Socrates (469-399 BC) through Plato (ca. 428-348 BC) to Aristotle (384-322 BC). Education is seen rather like a mental sport where the mind requires exercise to develop, like a muscle. Knowledge is accumulated more for the sake of disciplining the mind than for practical applicability because humans are considered curious by nature. Teachers decide what knowledge is appropriate and pass it on to the student in often literary speech; they are the

authoritative, 'know-it-all' experts. The range of subjects to be known is quite encompassing (theoretical, practical and productive sciences) and includes moral and spiritual considerations (Reeve, 2003). It is believed that intellectual power facilitates rational reasoning and control of the body and that this state of being will lead people to freedom and righteous citizenship. The philosophical argument of an essay is assumed to tell something about the capacity of the liberated mind.³⁴ Lifelong learning is, however, more a privilege for the social elite (Rubenson, 2010).

Freire (1973, 2002) criticises the liberal tradition for its absence of dialogue in class as well as the fact that the teacher deposits information into the student which may not even be connected. So-called 'banking education,' he argues, demotivates the human drive for inquiry, kills creativity and transformation and regards individuals as empty objects that need to be filled up with knowledge. Liberal education, in other words, does not liberate at all, for the individual's learning process is dominated by the teacher instead of by the learner. Since education creates both oppressor and oppressed, this cannot be a route to the humanisation of man.

Underpinning Freire's points, liberal education strives to liberate the mind only and not the full human being. In fact, the brain should be liberated from the body to be able to control the latter. Thus, liberal education is an example of the mechanistic paradigm, where education aims to separate the mind from the body in order to control nature.

3.1.2.2. Behaviourism

The second education philosophy is 'behaviourism'. The US-Americans Edward L. Thorndike (1874-1949), John B. Watson (1878-1958) and B. F. Skinner (1904-1990) may be seen as its founding figures. As opposed to the liberal philosophy, here human beings are believed not to be intrinsically motivated to learn and to need, therefore, extrinsic stimulation for so doing. In general, people are seen as heavily conditioned by their environments and, hence, without much freedom of mind. Correspondingly, freedom of choice is given only within a pre-determined curriculum. The teacher takes the position of the authoritative learning instructor who uses carrots and sticks to push and cajole students towards a certain target. Similar to animal training, the objective is to adapt individuals' behaviour to what is desired by their social and physical surroundings. Allegedly, the better that individuals are adjusted, the better will be society. 'Practice makes perfect'. The success of practice is usually evaluated through a demonstration of skills and written/oral tests (Kumar, 2009a; Scott, 1998).

³⁴ Liberal educational philosophy was developed more recently, i.e. in the era of Enlightenment, by Descartes (1596-1650), John Locke (1632-1704), Immanuel Kant (1724-1804) and John Stuart Mill (1806-1873), to name probably the most important figures (Schmitter, Tarcov, & Donner, 2003).

Those who support the behaviourist tradition utilise education as a means to prepare and change individuals to fit into existing social, economic and political structures. Thus, existing power structures are reinforced by a small and authorised elite that dominates the remainder. Structures are not to be questioned, but followed: "as it was in the beginning, is now, and ever shall be" (sentence in Gloria Patri in the Christian liturgy).

The idea of optimising society by using pre-determining behavioural objectives and extrinsic measures to meet them reminds one strongly on Frederic Taylor's Scientific Management at the beginning of the 19th century. The belief that human beings are not ambitious to learn and, therefore, require systems of control and supervision for learning connects with Douglas McGregor's (1957) management Theory X. Rooted in mechanistic thinking, in this model human beings are considered as programmable robots.

3.1.2.3. Progressivism

The third philosophical framework is termed 'progressivism', and it draws mainly on the US-American philosopher John Dewey (1859-1952). Other figures who have contributed to progressivism are Herbert Spencer (1820-1903, UK), Jean Piaget (1896-1980, CH) and Johann Heinrich Pestalozzi (1746-1827, CH), and Maria Montessori (1870-1952, Italy).

Dewey postulated the need for a democratic social community and that democracy requires citizens who can think critically and creatively, reflect on the self and others and solve problems together (Riley & Welchman, 2003). Therefore, learning stems predominantly from experience, where physical or 'human' books are used to deepen knowledge. Contrary to the liberal tradition, intellectual power is trained more through practical problem-solving than through acquiring theoretical subject matter. Moreover, education concerns problems for which the learner is interested in finding solutions and not those issues the teacher considers relevant and meaningful. Therefore, the individual is in control of the learning process while the teacher acts as a partner and guide. The individual learning process is supposed to span over one's lifetime with the aim of enabling individuals to progress and reform society collectively. In short, life is education and education is life.

It follows that progressive education is learner-centred as opposed to teacher-centred, unlike the liberal and behaviourist frameworks. There is continuous dialogue between learner and teacher. Individuals learn from the past with a view to a certain idea of the future. Every citizen is equally responsible for personal and social growth.

3.1.2.4. Humanism

The fourth educational belief system is 'humanism'. Humanistic philosophy was born in the mid-15th century in northern/central Italy as a response to medieval educational practice. It spread to northern Europe, reaching Spain, France, England and Germany. One key figure, who also lent his name to the European university exchange programme, is the Dutch scholar Desiderius Erasmus (1466-1536). In Germany, Philipp Melanchthon (1497-1560) was one of the humanist educators (Kallendorf, 2003). Carl Rogers (1902-1987) and Abraham Maslow (1908-1970) initiated a modern humanistic movement in the United States (Kumar, 2009b).

Like progressivist education, humanist education centres on learning from concrete daily life praxis rather than from abstract theory. Special attention is given to the ability to freely and eloquently express the experiences of self (Kallendorf, 2003). In contrast to the behaviourists, this ability requires emphasis on affective learning (Scott, 1998). In other words, emotions and values – respective, heart and soul – are central.

Moreover, where liberalists attempt to cut off the mind from the body, humanists bring them back together and, if anything, put the body first (Kallendorf, 2003). This much more holistic kind of education is fundamentally individualistic. Referring to ancient Athens' and Rome's understanding of humanness – that everyone is gifted and good by birth – humanist education strives to enable every person to reach their full potential throughout their earthly lives.

It follows that humanistic education is more prescriptive than descriptive in nature, as it focuses on what should happen in the future rather than what is happening now. It also is anti-discriminatory in that it caters to every human capacity. The continuous improvement of one's unique character and knowledge through self-directed learning is, eventually, the basis for exercising free citizenship and bringing about social change. The teacher takes the role of facilitator for every individual in the class and must have internalised his topic in order to spur affective learning.

Affective learning, however, is difficult to evaluate objectively (Scott, 1998). How does this pedagogical theory differ from humanist educational practice? How strong are its ancient Greek roots? Kallendorf (2003: 69) described the humanist learning environment as

"regimented note-taking, memorization, repetition, and close imitation, [...] painstaking attention to the detail of linguistic expression and [...] brief discussions that would illuminate small problems in the text: explanations of etymologies, identifications of mythological references, locations of place names, and so forth".

This picture suggests a mixture between liberal and behaviourist traditions whereby individuals are filled with humanistic thought material whilst trained in docility and creativelessness. Therefore, Kallendorf (2003) seems right to argue that it must have been a

challenge to utilise classroom work in real life while working towards the broader vision of freedom and self-actualisation under affective learning models.

3.1.2.5. *Radical*

The final educational tradition is 'radical'. Paolo Freire (1921-1997, Brazil) and Ivan Illich (1926-2002, Austria/US) represent "arguably two of the strongest radical traditions vis-à-vis education and technology" (Kahn & Kellner, 2007: 432). Illich (1971) proposed, for instance, to separate education from the state as much as the state was once separated from the church. He was against institutionalised schooling that conditions human beings into society. Instead, Illich advocated 'learning webs' that arise through non-hierarchical learning exchanges between teachers and students as well as between students themselves.

Since the 1970s, the Italian Antonio Gramsci (1891-1937) and his prominent work on the 'hegemonic power' of the ruling class protected by the 'coercive power' of the state has also influenced radical educational philosophy (Crowther & Martin, 2010). Later, Michel Foucault (1926–1984) contributed to the radical philosophy his understanding of power as being both destructive and productive (Mason, 2010).

Illich's friend and temporary colleague Freire (1973, 2002) has become prominent with his plea for 'critical consciousness' as opposed to 'naïve consciousness' and the concept of 'action and reflection'. In what Maxine Greene (1977: 121) calls "wide-awakeness [..., i.e.] being in the world", people need to realise what is going on in and around them, and why.³⁵ They need to think about what they consider appropriate and inappropriate and then act upon their judgement. Only action will eventually change reality: "there is no transformation without action" (Freire, 2002: 87). The ultimate purpose of radical education is making humans more complete and leading thus to humanisation.

For critical thinking, dialogue is essential, according to Freire. Not only will dialogue be the basis for transformative knowledge, attitudes and skills but, like in progressive education, it also transforms the learner from an object to be educated to a subject who self-educates. Importantly, critical dialogue is not an act of manipulation and domination founded on a feeling of elite power. Critical dialogue is based on the emotions of compassion and humility as well as a spirit of faith and hope: "a profound love for the world and people", a feeling of commonness and partnership, "an intense faith in humankind, in their power to make and re-make", and in hope as the driving force "leading to the incessant pursuit of the humanity denied by injustice" (ibid: 89-92). Injustice is, as we remember from mobilisation theory, vital for people to take action (chapter 2).

³⁵ Greene (1977) borrows the term 'wide-awakeness' from the Austrian philosopher and sociologist Alfred Schütz (1967) (1899-1959).

Essentially, the radical learning process of personal and social awakening aims at individual and collective transformation through emancipation from domination and oppression. Therefore, the teacher-learner relation must be one of equals, where the teacher facilitates empowerment.

To illustrate how teaching can reinforce oppression and hierarchies as much as freedom and equality, Freire (2000) distinguishes between two types of education. Indoctrinating education, or what he also calls the 'education of answers' and 'domesticating education', is useful to mould human beings towards becoming docile and obedient to authority. Liberating education, or the 'education of questions' (Freire, 2000), is supposed to develop people's creativity and lead them towards autonomy. The former is grounded on a mechanistic view of education which trains people to memorise contents and pass exams. The latter acknowledges the humane side of the human being and builds people's capacity to challenge content and create their lives. Whilst the first approach to education is supposed to form people into existing social, economic and political structures, the second way empowers us to re-form these very structures. Hence, where indoctrinating education is oriented towards reinforcing the past, empowering education is oriented towards creating an alternative future. In other words, 'education of answers' is fairly conservative while 'education of question' is rather progressive.

In essence, the radical educational philosophy is dedicated to fundamental personal, social, economic, political and ecological change. Transformation, on micro and macro level, is brought about, on the one hand, through constructive critiques of institutions and ideologies that maintain existing discriminatory power structures. On the other hand, transformation relies on creative, autonomous and interactive human agency.

Kumar (2009a: 38) suggests that the radical philosophy is mainly criticised for encouraging "detrimental disdain for traditions, hierarchy (such as parental control over children), and self-isolation". Arguably, as long as traditions promote equality and democracy, no radical philosopher had reason to attack them. Hierarchy must, however, not be confused with leaders and followers. Both can have equal status and power and the two cannot exist without the respective other. It is not self-evident that the one who decides has an advantage over the other. Rather, both leader and follower create something bigger through teamwork and unity.

Parents, likewise, have responsibility for their children and need to constrain them whenever they harm self, others or nature. Those who put forward that self-isolation results from the radical school have not understood its focus on community and mutual learning through communication.

With these five educational philosophies in mind, there are, broadly speaking, three groups of mind-sets: namely, Conservatives, Reformers and Transformers. Nonetheless, all of them see quite the same goals for education: namely, individual freedom and independence as well

as the survival and development of society. However, whilst Conservatives see these tasks as a privilege for the ruling classes, Reformers and Transformers consider all citizens eligible as responsible for personal and social development.

In all these philosophies, we can identify the 'four pillars of learning' which the UNESCO (2014) suggests: learning to know, to do, to live together and to be. Education may, hence, be a means to foster people as much as societies in their intellectual, psychomotoric, emotional and spiritual growth. As such, the four pillars of learning resemble and address the four basic human elements: mind, body, heart and soul (see chapter 4).

Eventually, education may be seen as the most important asset of nation states, as it determines a nation's social, economic, political progress and ecologic understanding (Kumar, 2009a; Marples, 2010). Assumptions about the aims of education reflect the individual and collective understanding of what kind of society is desired (Marples, 2010) and what it means to be human (Standish, 2003).

3.2. Trade Union Education

Trade unions are part and parcel of adult education. On the one hand, their constituency consists of adults. On the other, trade unions are major political actors, for they represent the social, economic, political and environmental interests of workers from the local to the global level. Trade unions' educational activities, therefore, mark a distinct part of adult education.

3.2.1. Conceptual Considerations

Spencer (1998: 165) puts trade union education simply as "all education offered by unions for their members" (also Bürgin, 2013; Spencer, 2002a). Unions have a variety of members, yet basically three kinds. Hauptamtliche/Funktionäre or full-time officers (FTOs) (e.g. union leaders and secretaries, policy and legal advisors, organisers, administrative staff, etc.) are recruited and paid by the trade union. Ehrenamtliche or honorary staff (e.g. works/staff council members, youth and apprentice representatives, health and safety representatives, shop stewards, etc.) are elected by their peers and, depending on the institutional framework, may be compensated for their extracurricular time by their employer or union. The vast majority of members are without staff or representative function.

Education for full-time staff is generally regarded as personnel development and, hence, a matter of the unions' Human Resources department. Education, for all other union members, can rather be seen as a typical form of political adult education known as 'Arbeiterbildung', or workers' education. Moreover, union membership comprises both men and women, young and mature, (trans)nationals and foreigners, advanced and basic educated, educationally passive and active, autonomous and authoritarian learners, etc., all to different extents. In brief, the target group of labour educational activities is quite diverse.

Possibly based on this background, Spencer (1998) distinguishes between 'union education', 'labour education' and 'workers' education'. For him, these three areas have different purposes and providers. Also, Taylor (2007) builds on this distinction.

Union education or trade union training is provided by the organisations themselves and aims at improving the organisation's collective representative power and activity; in short, its effectiveness. This concerns preparing activists/representatives and union leaders. In other words, both Spencer and Taylor see union education as part of what is termed, in business, 'organisational development' (OD).

Labour education includes union education plus courses for trade unionists offered by educational institutions outside of the labour movement, such as colleges and universities. Programs like the European Master in Labour Studies (EMLS) or other degree courses on industrial and labour relations, and trade union studies which do not target particularly labour representatives but students in general, would not fall within Spencer's definition of labour education. Excluding such degree courses from labour education makes sense given that the field originates from liberal adult education, where learning is rather for life than for credit – even though (potential) participants appear, increasingly, to demand accreditation (Towers, 1987).

Workers' education constitutes the largest category and the original understanding of education for and of the working class. As workers' education is viewed more broadly than labour education, educational providers can include trade unions and other organisations, both internal and external to the labour movement. The providers would aim mainly at developing a distinct class consciousness which is based on "an alternative labour knowledge and culture" that have arisen largely through Marx's Communist Manifesto (1848) and are, hence, older than trade unions as such.

These alternative views have, however, been largely repressed since World War II, as trade unions in the more developed countries redirected their focus on establishing legal frameworks for industrial relations and functioning within them (Taylor, 2007). By narrowing workers' education to union education, an interest in alternatives and a wider critical analysis behind workers' education has fallen among workers and their representations (Spencer 2002: 12; Taylor, 2007). A rediscovery of this would entail "a renewed focus on political economy and social analysis" (ibid). Arguably, a rediscovery of workers' education must also now include ecologic concerns given the global environmental destruction which has materialised during the last 100 years.

This threefold conceptualisation of education for and with the labour movement reminds one of an earlier illustration from Dwyer (1977, in Towers, 1987). With a view to the US, Dwyer draws a historical line between workers' education (1900-1935), labour education (1935-1965), a post-war transition period (1948-1967) and labour studies (1965-). The latter is more

or less an amalgamation of the former two periods in terms of objectives, curriculum, target group, course length and financing/administration. Labour studies would, therefore, take a more holistic and inclusive approach than in the previous epochs. Whether this is, indeed, the case in practice requires further research.

Another term which sounds similar to, but is different from, the outlined features of labour education is 'worker education'. Whilst worker's education means education for workers, worker education means education for work (Spencer, 1998). Put differently, workers' education prepares (potential) trade union members for membership, whereas worker education makes (potential) employees fit for their jobs. Employability is mostly the result of vocational training. Thus, where workers' education has a collective purpose in the interest of labour and society, worker education aims at individual benefits in the interest of capital and wage earners. As a part of lifelong learning, worker education is equivalent to the more recent corporate terminology of 'workplace learning', 'workplace learning and development', 'work related learning' or 'work-based learning', and is often part of Human Resources management. Traditionally, vocational training is not regarded as within the scope of trade union education.

It appears questionable, however, whether this strict theoretical and traditional differentiation is made in practice (anymore). The Workers' Educational Association (WEA, 2015), for instance, offers "part-time education for everyone". Established in Britain in 1907 and enlarged internationally through operations in Australia, New Zealand, Zambia and Sweden, their community education programme is also geared towards enhancing learners' employability. When the ILO international Training Centre (ILO-ITC, 2015) talks about workers' education, they consider union members and staff alike. Their purpose for workers' education is what Spencer (1998) describes as organisational development, namely strengthening unions' capacities to make better representatives.

Moreover, trade unions may be engaged in worker education through Union Learning Representatives (ULRs) supported by Union Learning Funds (ULFs), as in the UK (Bacon & Hoque, 2010; Forrester, 2002; Shelley, 2007) and Ireland (ICTU Union Skills Network). Spencer (2002a) notes that, in some countries, trade unions have long included vocational concerns in their education and training programs. Forrester (2010: 142) maintains that "the employability agenda historically remains an important educational focus". Such a focus makes sense, as trade unions may want to support their members in (re-)training in case they lose their jobs to economic rationalisation and relocation and also in regards to employment skills development (Taylor, 2007). This training vacancy can be used to disseminate both labour skills and ideology at the workplace.

The various utilisation of the terminology of union, labour and workers' education may also be different in different countries. For example, what is labour education for Spencer (1998) would in Germany be summarised under the umbrella of 'gewerkschaftliche Bildung(sarbeit)'

or 'Gewerkschaftsbildung', under 'formation syndicale' in France, 'formación sindical' in Spain and 'formação sindical' in Portugal. For all of these national terms, however, the closest English translation is '(trade) union education'. Given this, English speakers might incorrectly assume that the German, French, Spanish and Portuguese labour movements have a rather narrow view of the education for theirs.

Today, the phrases union, labour and workers' education are used by the actors interchangeably, where educational providers attach their own interpretations of education and training for the labour movement. For the author, it would make more sense to use labour education as the broadest category, one which would include union and workers' education, because 'labour' is an expression of the working class and its distinct ideology. The term also has a functional sense when it is describing human physical and mental power. But, for matters of simplicity, (trade) union education, labour education and worker' education shall be used in this research project interchangeably.

3.2.2. Purposes

Contrary to the diverse terminology and understandings of trade union education, its purposes appear quite universally applicable. Spencer (1998: 166) suggests three purposes: equipping union members and staff with the *tools* they need to engage actively in the organisation; educating them about labour-related *events and issues*; and evolving their constructive ideas and values about union and *class consciousness*.

These three purposes are reflected in Negt (1974: 17–18 author's translation) as "Erziehung zum Klassenkampf" (training for class struggle), "Erziehung zum politischen Denken" (training for political thinking) and "Erziehung zum soziologischen Denken" (training for sociological thinking). The latter, especially, would enable workers and their representatives to see the bigger picture of the processes in production and reproduction and make sense of new information more quickly. Illustrating the bigger picture is what mass media and general education mostly discourage through providing disconnected and objectified ("verdinglicht", *ibid*: 31) information. Understanding these processes and their oppressive goals would, conversely, be the basis of engaging in class struggle.³⁶

Altogether, reminding us on the abovementioned concept of 'workers' education', trade union education "helps to sustain and build a "labour culture" – an alternative perception of events and society" (Spencer, 1998: 166, also Dera, 2006; Forrester, 2010). These alternatives are, arguably, the result of interpreting events and issues critically as well as envisioning

³⁶ Political and sociological thinking falls rather short at schools and universities (Negt, 1974). Arguably, this shortcoming is created on purpose. The purpose is to prevent people from understanding how political decisions make them become servants of the economic and political system. In other words, education is (mis)used as a means to reproduce power structures. By integrating political and sociological education in trade union education, trade unions may contribute to make people aware of their oppression.

human society living up to the values which trade unions usually hold: democracy, justice, equality, sustainability, solidarity, peace, freedom, etc. Thus, trade union education can facilitate “the creation of those circumstances in which” we “can have the chance to live by values that give meaning to life” (Alinsky, 1989: 3).

Trade union education, therefore, aims in particular at developing critical political judgment skills and social-economic awareness (Kaczmarek, Kehrbaum, & Roggenkamp, 2012). The insights gained from critical analysis would, in turn, be the basis for developing willingness and competencies to act (*‘Handlungsbereitschaft und -kompetenz’*, Kehrbaum, Peitsch, & Venzke, 2013; Scherbaum & Ludwig, 2006). Referring to the cultural resource of rituals (see chapter 2), participation in strikes, negotiations, conferences and campaigns as well as other hands-on learning opportunities at the workplace and beyond must not be forgotten in terms of developing willingness and competencies to act: “by participating in political actions, new activist identities are formed” (Apple, Au, & Gandin, 2009: 11, also Spencer, 2002a).

However, critical political judgement and social-economic awareness are not enough to build activist identities or a labour culture that is devoted to class struggle. As underscored in the mobilisation theory discussed in chapter 2, the perception of power, peace and injustice is essential for people to fight for change. Behind these perceptions are feelings of self-efficacy, confidence, urgency, equity, pride and dignity. These feelings are the motors for taking action upon the knowledge and skills which workers have arrived at through awareness and critical evaluation. Otherwise put, having knowledge about events and issues and the skills to act upon them does not necessarily imply that one is willing to do so. Trade union education must, therefore, also address explicitly workers’ attitudes and morals, which provide motivation and meaning.

In addition to the broader and more abstract purpose of building particular labour identities and culture, the concrete purpose of trade union education is to offer workers and their representatives immediate and reasonable guidance on how to act and why. This guidance is called *‘Handlungsorientierung’* (action orientation), and it is key to trade union education (Bürgin, 2014; Dera, 2006). In the broadest sense, action orientation is not limited to behaviour at work or within the trade union, but it addresses human interactions with self, others and the environment (Kurzer, Mannheim, Lauenroth, & Gehring, 2006).

In sum, trade union education means providing appropriate knowledge, attitudes and skills to build a distinct labour culture based on alternative interpretations of the world and offering an orientation to act accordingly. Theory and practice mutually reinforce each other and may become praxis. Important for creating a distinct labour culture is a praxis to learn, act and advance together (Salt, 2000). Essential for labour to collaborate across borders is a specific praxis of realising similarities and forming alliances (*‘Bündnisfähigkeit’*) (Kurzer et al., 2006). Both competencies are fundamental to solidarity actions.

The concept of education as knowledge, attitudes and skills reflects Pestalozzi's idea of hand, head and heart. A similar threefold view is mirrored in Kurzer, Mannheim, et al. (2006), who attach to labour education three functions: namely, to mediate between different interests ('Vermittlungsfunktion'), to provide service for generating insights ('Servicefunktion'), and to create meaning for actions ('sinnstiftende Funktion'). Above all seems to float a critical-creative and collective spirit, which is inevitable for arriving at alternative interpretations of what happens in the world and bringing labour's interests and ideologies forward. Given this, labour education may eventually involve all four human elements, which are body, mind, heart and soul (see chapter 4).

3.2.3. Course Programmes and Learning Structure

Table 3-1 maps the three areas of education – knowledge, attitudes and skills – which may appear in trade unions' educational programmes. The focus of educational activities for workers and their representatives, however, may differ according to where trade unions position themselves on Hyman's (2001) eternal triangle between market, class and society.

Table 3-1: **Different Areas of Trade Union Education**

	Definition	Pestalozzi's Idea	Human Element
Knowledge	Information and understanding of certain <i>events and circumstances</i> which may concern both special and wider issues. Information and understanding may be hence both deep and broad.	Head	Mind
Attitudes	Mind-set of <i>values and ideas</i> which provide guidance for behaviour and reason to act.	Heart	Heart and Soul
Skills	<i>Tools</i> that enable and support the desired action.	Hand	Body

Source: Forrester (2010), Spencer (2002a), Stirling, (2002), Taylor (2007); own illustration

Knowledge on special issues may include topics such as sexual harassment, racism, Human Resource Management strategies and social dialogue/partnership. Wider circumstances can concern, for example, labour history, the changing nature of work, economics, politics, industrial relation systems, the European Union, globalisation, etc. Attitudes may relate to solidarity, collectivism and democratic participation. Skills training can be divided in hard and soft skills. Hard skills refer to role-relevant abilities, whereas soft skills are a matter of personality. In trade union education, hard skills can mean union administration, grievance handling, collective bargaining, health and safety, legal rights (e.g. equal opportunities, working time), EU funding, organising, etc. Personal skills development includes communication, negotiation, ICT literacy, team building, leadership, and interpersonal skills.

The distinction between the three fields of education will be used later in the empirical sections (parts III and IV) for categorising trade unions' educational programmes.

Key to designing course programmes is developing a learning structure, creating distance learning opportunities (where learner and lecturer are disassociated in time, place and/or space), offering e-learning (using ICT to enhance learning) and providing accreditation in collaboration with universities and other institutions (Bridgford & Stirling, 2000a; Stirling, 2002).

Arguably, distance learning challenges the idea of collective and, especially, social learning. At the same time, given that many workers and their representatives do not have backing for paid education leave, distance learning may be a key way to access trade union education. Accreditation is contentious, as it may challenge the notion of collective and cooperative learning for advancing the labour movement as opposed to individual and competitive learning for progressing one's own career. Learning for credits implies the question of 'pass' and 'fail', which requires assessment. Assessment, in turn, implies a form of hierarchy between teacher and learner. Hierarchy, however, is against the philosophy of active, student-centred learning, which is integral to the progressivist, humanist and critical-radical tradition.

3.2.4. Transnational Trade Union Education

As we have shown in chapters 1 and 2, trade union education must facilitate interest, representation and democratisation across borders (Allespach, Meyer, & Wentzel, 2009). However, the field of transnational labour education appears almost untouched, in both academia and trade union praxis (Kehrbaum & Zitzelsberger, 2011). "Coordinated transnational union/labour education remains limited to relatively isolated, small-scale, often one-off projects" (Kirton & Gatta, 2013: 231).

Apparently, neither transnational collaboration in trade union education nor education to facilitate cross-border teamwork is a priority issue for the vast majority of trade unions. Kirton and Gatta (2013) put forward low resources as a reason for this. Shaiken, Herrnstad and Worthman (2002) suggest that other factors that may hamper transnational trade union education, such as conflict of short-term interests, nationalist ideology and different organisational structures. They find, however, that educational activities like cross-border visits can deepen personal commitment to transnational labour collaboration.

Arguably, any form of transnational labour education requires a common understanding of labour educational concepts. IG Metall's project 'Quali2move' may be seen as a first effort in this respect (see chapter 8).

The empirical parts III and IV will shed some more light onto the otherwise unexposed field of transnational trade union education.

3.3. Challenges to Trade Union Education

3.3.1. Different Unions, Different Purposes

Depending on the type of unionism (with reference to the triangle between market, class and society) (Hyman, 2001), labour, union, workers' and worker education is designed to meet the abovementioned purposes and human elements to different degrees and understandings.

More market-oriented unions, which can be found in the Anglo-American world, focus their education programmes on skills training for union staff and membership to improve their employability and representative roles. Towers (1987: 7) criticised British and US-American unions as "almost entirely concerned with training trade union officers in the skills of their trade". Luce (2014: 153) argues, likewise, against the narrow focus in the US and Canada, in which "many existing labor education programs emphasize basic union skills, such as filing grievances or dealing with contract negotiations. While important, these skills alone are not enough to give union members the broader understanding of neoliberalism and its impact on workers". This broader understanding is better established by more society-oriented unions, such as the German, which are more likely to concentrate education on knowledge of events and issues. Class-oriented unions, like those in Italy, can possibly be expected to emphasise more unions and class consciousness.

As a result, different union types develop workers' hands, hearts and heads to different extents and in different ways, depending on the educational philosophies underlying their programmes. Therefore, not only different labour spirits but also different cultures of trade union education evolve.

These differences in understanding of the purposes of labour educational activities might hamper collaboration in trade union education across borders as much as education that is supposed to enhance trade unionists' transnational competence. Especially hampering would be if trade union education addresses the four human elements unevenly – in other words, if labour education positions itself on some point on the sides of the 'eternal Hyman-triangle' instead of in its centre. In other words, for facilitating transnational labour collaboration and eventually labour renewal through education, trade union education will have to develop all participants' knowledge, attitudes and skills to equal amounts.

However, unevenly balanced labour education seems to be currently in place on the European continent. Stirling (2002) has observed in the European Economic Area a general shift from broader political education towards a focus on skills and competency training. Parallel to the increased commodification of education mentioned earlier, trade union education has moved towards more market-orientation, too. Stirling explains this shift through a more unified ideology between national confederations, legal constraints regarding content and target groups and trade unions' own strategic priorities.

With regards to Germany, Bürgin (2006, 2013) supports Stirling's observation that trade union education tends to move towards a market-orientation. She is concerned that the understanding of competencies is fairly narrowed to cognitive abilities. She also worries that the narrow emphasis on competencies may constrain the broader concept of (trade union) education. She is, moreover, sceptical that the competencies view goes along well with critical pedagogy.³⁷

Luce (2014: 153) proposes, similarly, that the shift towards competencies does not work in trade unions' favour, neither regarding their representative mandates nor their effectiveness: "to fulfil the potential role that unions have – including countering corporate power, expanding democracy, and exploring alternative economic models – unions must dramatically expand the reach and depth of their education programs". Another possibility to broaden the labour educational perspective is, arguably, to expand the understanding of competencies. As will be shown in chapter 4, Transnational Competence (TC) demands a wide and various range of skills. As TC allows, (re)creating a unique consciousness of labour, competence orientation and critical pedagogy can complement each other very well. TC is, likewise, an example of 'labour ju-jitsu', or what Bürgin (2006) calls 'Umkehrungsstrategie', which refers to using the enemy's power – which is, in this case, neoliberal – against him.

3.3.2. Different Types of Pedagogical Approaches

Active learning, participant-, learner- or so-called worker-centred methods and methodology are now widely accepted in trade union education in Europe (Bridgford & Stirling, 2000a; Stirling, 2002). According to the ETUI-ILO Trainer Guide, active learning methods include study visits and public speeches, videos, discussions, presentations and simulations, or having another actual experience (ETUI, 2013b). These may include, for instance: After Action Review, Brainstorming, Case Study, Expert Panel, Fish Bowl, Jigsaw, Knowledge Fair, Open Space, Participatory Modelling, Peer Assist, Role Play, Round Robin, Sociometrics, Storytelling, SWOT (strengths, weaknesses, opportunities, threats) Analysis, Thinking Hats, Timelines, Top 100 Lists and World Café.³⁸ Active learning methods are eventually supposed to develop autonomy.

³⁷ Competencies became the new guiding concept in education and learning in the 1990s as part of the neoliberal reorganisation of society and economy. In this light, competencies have been invented in an effort to mould people in the service of market-led capitalism, and make them responsible to follow this under the cover of lifelong learning. Bürgin's scepticism that a focus on competencies would make trade union education less emancipatory is based on several reasons. Firstly, competencies would be orientated towards finding immediate solutions to problems instead of reflecting on the wider issues that have caused the problems; secondly, competencies required to be measured through (self-)evaluation which might not be fancied by participants. We may remember that trade union education opposes the principle of evaluating learning outcomes, because every participant might take different lessons from an educational activities where one is not better than another. In a similar vein, thirdly, competencies would foster individual competition and conversely, therefore, hamper preparing participants for solidarity actions.

³⁸ The scientific rationale for active learning methods, which the ETUI/ACTRAV Guide draws on, provides Edgar Dale. He contends that, after two weeks, we humans tend to remember 10% of what we read, 20% of what we heard (words), 30% of what we saw (pictures), 50% of what we saw and heard (movie, demonstration, visit), 70%

In addition to inviting course participants to actively create their learning processes, it is essential to nurture the learners' ability to understand how immediate issues are connected to other events and wider circumstances (Negt, 2010). 'Zusammenhangswissen' (connected knowledge) is required for relating different worlds of life and work to each other and forming meaningful collective action (Bürgin, 2014). Scherbaum and Ludwig (2006: 58) point, additionally, to their understanding of mutually reinforcing connections, which are vital for labour educational processes. A holistic and thorough view is not what the social, economic and political elite wants their 'servants' to obtain, they argue, because the oppressors fear that the oppressed may realise the mechanisms and structures of domination, stand up against them and challenge the elite's position of power.

But, in learner-centred fashion, 'Zusammenhangswissen' must not be taught, but evolved together with the learners. This depends on how well trainers are able to facilitate 'connected knowledge' and which connections they try to steer the learner to create. At the same time, it depends on which connections the learner creates on the basis of previous experiences.

These connections build, as well, the level and kind of activities used in trade union education. Labour pedagogical approaches can be found on a range between facilitating 'accommodation' to the 'transformation' of social, economic and political structures (Forrester, 2010; Novelli & Ferus-Comelo, 2010; Salt, Cervero, & Herod, 2000). The reason why some pedagogical approaches support existing power relations in society, economy and politics whilst others challenge them can be traced to the choice of educational philosophy and their respective pedagogical assumptions and tool-sets. Given that trade union education in Europe strives for active learning methods, the dominant pedagogical approaches must be rooted in the progressivist, humanist and radical schools of thought. The less radical, more reform-seeking humanist and progressivist philosophies are predominant (Sarbo & Wang, 2004). Transformative power has, arguably, only the radical philosophy.

Especially because the radical philosophy appears not to predominate in trade union education, the thesis is majorly informed by it, in addition to progressivist ideas. The pedagogical approaches originating thereof relevant to this thesis are constructivism, connectivism and critical (Table 3-2). They are explained in more detail subsequently.

of what we said (discussion, public speaking), and 90% of what we did (presentation, simulation, experience) (ETUI, 2013: 22). Active learning methods appear, hence, to stimulate more the long-term memory. What we learn through more passive learning methods like reading, listening and seeing, however, seems rather be stored in our short-term memory. Given this, active learning can obviously facilitate deeper or more qualitative knowledge, whereas passive learning may enable broader or more quantitative knowledge.

Table 3-2: **Different Pedagogical Approaches to Trade Union Education**

	Constructivism	Connectivism	Critical
Definition	The learner builds knowledge actively through interaction with his environment. The constructed subjective reality depends on the learner's previous knowledge, attitudes, skills and current situation.	Like constructivism, assuming that the learner is part of a human and digital network which can be always accessed.	Like constructivism, with the aim to understand the impact of unequal and unjust social, economic and political structures on the learner's reality. The learner is encouraged to counteract injustices.

Source: own illustration

3.3.2.1. *Constructivism and Connectivism*

As will be shown in chapters 6 and 10, the ETUI Education Department and the DGB Bildungswerk BUND (DGB BW), respectively, advocate a social constructivist approach to learning. Social constructivism is related to the progressivist philosophy of education and to the works of the Soviet psychologist Lev Vygotsky (1896-1934) (Davis & Sumara, 2010; Wertsch, 2010). He assumed that, during our lives, our view of reality is shaped by the interactions we have with other people. Knowledge is, thus, constructed by humans through social interaction. Since it depends on the past and present environment and what people we have encountered, a social constructivist view acknowledges that people's personal histories and current circumstances influence both the quality and quantity of knowledge they have gathered.

Gabriela Portela (2013, interview), the ETUI Education Officer responsible for the area of Pedagogy and Eurotrainers as well as Language and Communication, explains, similarly, that a social constructivist approach to learning includes the individual's previous knowledge and experience. At the same time, the individual builds knowledge through experience. The learner is, hence, supposed to actively create his own individual learning path instead of just passively following the trainer's route. Conversely, the trainer is supposed to enable the learner to actively participate in the learning process. The role of the trainer is, therefore, predominantly as facilitator or tutor instead of as teacher.

Social constructivist pedagogy assumes that learning takes place face-to-face. This assumption, however, challenges the modern digital era and its possibility for human beings to be connected to the *international network* (Internet) 24/7. Nowadays, learning may happen online both formally and informally. Informal learning may be delivered through social networks like Facebook, LinkedIn and Twitter, and videos on YouTube and TV channels, online magazines, newspapers, blogs, wikis, etc. Formal learning is possible through universities which offer degrees through distance learning (e.g., the UK-based Open University) or

certificates through open online courses like MOOCs (Massive Open Online Courses). Essentially, the Internet, in combination with fast technological progress, facilitates learning opportunities which are global and irrespective of time, space and place (Selwyn, 2009). To account for digital education theoretically, the Canadian scholar Georg Siemens (2005) has added to constructivism the idea of connectivism.

Connectivist education may, in fact, include several elements of disconnection. The benefits which learning in electronic networks provide to some are not available to others. Connectivist education is open and empowering only to those who are pre-empowered with ICT skills and can access the internet via computers or a smartphone. Using these technologies presupposes certain cognitive and psychomotoric abilities, financial status and physical location, which poorly developed areas of the world may not provide, or which are available only to the privileged of the poor. Furthermore, how social is connectivist education when individuals sit alone in front of Internet-capable devices? How connecting is connectivist education once the learner is 'off-line'? To what extent can interpersonal skills be developed if social relations are mediated through a screen or chat space that filters and may block human senses? Who guides the online learner who may be misguided by extremist, militant, deceptive, uncritical or otherwise destructive opinions? Who assists the learner in assembling the pieces of information found into a whole of critical 'connected knowledge'?

Given this background, careful analysis is required to evaluate the extent to which connectivist pedagogy may be suitable for collective learning that is supposed to result in solidarity actions.

A way in between which attempts to utilise the benefits of both constructivist and connectivist ideas is 'b-learning'. Blended or hybrid learning is a combination of residential and distance education, or 'd-learning' (Bliuc, Casey, Bachfischer, Goodyear, & Ellis, 2012; Chou & Chou, 2011; O'Connor, Mortimer, & Bond, 2011). "Blending methodology and technology" (ETUI, 2013a: 22) allows a mixture of learning both within and outside the traditional classroom. Blended learning appears to be an educational approach which is both balanced and innovative (Chou & Chou, 2011). Distance learning may be used to convey information in a short time. Subsequent in-class sessions can provide the space and time to help connect with other participants the bits and pieces of information and hence to create 'connected knowledge'. The proportion and kind of blend will, however, vary according to many factors, such as the subject's complexity as well as time and other resources. It depends, also, on the participants' preferences and access to ICT.

3.3.2.2. *Critical-emancipatory Education*

Chapter 8 will show that both Verdi and IG Metall subscribe to critical-emancipatory education whilst some DGB BW trainers apply critical pedagogy against the official social constructivist tenor. Yet DGB appears in transition towards critical-emancipatory education. Like DGB BW trainers, Irish trade unions may utilise critical pedagogy in their courses, yet without trade unions committing explicitly to it (chapter 9).

In fact, "there is an urgent need for education to be critical and emancipatory", not only in order to challenge the neoliberal proposition that There Is No Alternative (TINA) to capitalism, exploitation and alienation of labour power and other natural resources (Cole, 2005: 3; also Bürgin, 2014; Macrine, McLaren, & Hill, 2010; Mayo, 2003). Critical and emancipatory education seems also urgent for challenging how human society from the local to global levels is organised socially, politically and economically. For so doing, "it is necessary that the weakness of the powerless is transformed into a force capable of announcing justice [and] transforming this offensive world into a more *people-oriented* one, from both a political and ethical standpoint" (Freire, 2000: 36/46 emphasis in original).

Critical-emancipatory education is rooted in the radical educational philosophy. It is a "pedagogy of imagination, humanism, agency, and becoming" (Rautins & Ibrahim, 2011: 24). Like social constructivism, it takes individuals' histories and present states of knowing and being as points of departure: "when students come [...], they bring with them, [...] in their bodies, in their lives, they bring their hopes, despair, expectations, knowledge, which they got by living, by fighting, by becoming frustrated" (Freire quoted in Bell, Gaventa, & Peters, 1990: 157). However, critical-emancipatory education goes beyond social constructivism in that it tries to reveal the way and extent to which individual experiences are the cause of unequal and unjust social, economic and political structures, and it encourages the learner to take revolutionary action (Mezirow, 1983). Social constructivism neither seems to transcend the evaluation of current structures nor would it necessarily question them.

As such, critical-emancipatory education builds on humans' suffering, fears and hopes (Scherr, 2005). It "also involves keeping alive the dreams [and] utopian visions" of equality, justice and liberation from oppression, which is typical for radical traditions (Apple et al., 2009: 4). Critical pedagogy is, hence, deeply cognitive and affective at its heart, an "example of counter-hegemonic activity" (ibid: 5) as well as "education of the soul" (Dirkx & Mezirow, 2006: 128). In short, critical pedagogy seems holistic as it touches all four human elements.

Transformative learning requires solidarity between all four human elements, namely body, heart, soul, and mind. Freire (2000: 30) describes this critical consciousness as a unity: "I know with my entire body, with feelings, with passion, and also with reason". Tisdell and Tolliver (2001: 13) appear unsure whether the body element can contribute to transformative learning, however. They assume that "*the cognitive, the affective, and the symbolic or*

spiritual (emphasis in original) are likely to evolve through transformative experiences. Yet, from a holistic perspective, it seems unreasonable to exclude bodily sensation as a factor contributing to transformation.

Like solidarity (see chapter 2), transformative action seems to evolve first and foremost from a base of heart and soul: "passion has been called the power of possibility. This is because it is the source of our interests and our purposes" (Greene, 1986: 427). Likewise, Alinsky (1989: 22) maintains that "all revolutionary movements are primarily generated from spiritual values and considerations of justice, equality, peace, and brotherhood".

Critical-emancipatory education owes much to Paulo Freire and Oskar Negt. The innovative way in adult education which Freire pursued through connecting literacy training with emancipatory education in *Pedagogy of the Oppressed* has left a legacy of critical-emancipatory education not only for community education in Brazil but globally. Freire-related organisations can be found all over the world, such as in South Africa, Canada and the US as well as countries in Europe, including Ireland and Germany.³⁹ "No one has done more to move the struggle forward over the role of education as a vehicle for liberatory praxis than Paulo Freire" (McLaren, 2001: 109).

Freire was connected in his ideology to the neo-marxist Frankfurt School,⁴⁰ which can be considered the epicentre of critical theory in Germany (Kellner, 2003; Mason, 2010; Pongratz, 2005; Ryoo & McLaren, 2010).⁴¹ From this epicentre, established in 1923, Oskar Negt (*1934) graduated with a doctorate supervised by Theodor Adorno (1903-1969), who is among the founders of the Institute of Social Research from which the Frankfurt School emerged. Negt's (1974) *Sociological Phantasy and Exemplary Learning* can be regarded the bible for trade union education in Germany. Drawing from sociology, social psychology and history, it suggests that through 'sociological phantasy' and 'exemplary learning' labour may, on the one hand, develop class consciousness and create thereof an utopia of a class-less society and the emancipation of humanity. On the other, workers are enabled to prepare a "system-blasting praxis" (p. 24,

³⁹ <http://www.freire.org/paulo-freire/paulo-freire-organizations>, accessed 1 July 2015.

⁴⁰ In *Pedagogy of the Oppressed*, Freire quotes Erich Fromm (1965, 1966), Georg Lukács (1960, 1965) and Herbert Marcuse (1955, 1964). The latter two are among the Frankfurt School's founders.

⁴¹ Critical theory can be traced back to Ancient Greece (Socrates, Plato and Aristotle) and was recaptured through German philosophers like Immanuel Kant (1721-1804) and Friedrich Hegel (1770-1831) during Enlightenment (Ryoo & McLaren, 2010). The major impetus emerged in mid-1800 through the analyses of Karl Marx and Friedrich Engels of capitalist societies where the ruling class of bourgeoisie exploits the proletariat for accumulation of wealth and reinforcement of power (Kellner, 2003; Ryoo & McLaren, 2010). Critical theory focuses thus on "enlightenment, critique of domination, and emancipation. [... It] aims to reveal the inner contradictions of the bourgeois world, without lapsing into the traditional mistake of suggesting its own recipes to the society it is criticising" (Pongratz, 2005: 155).

The Frankfurt School expanded the classical Marxian view on economic production by the examination of culture and challenged Marx's idea that a revolution of the working class is inevitable (Ryoo & McLaren, 2010). The British pendant to the Frankfurt School may be seen in the Birmingham School which bases on the cultural studies by E. P. Thomson, Raymond Williams and Richard Hoggart in the 1950/60s (Kellner, 2003). In other parts of the world, especially those who fell prey to European imperialism, critical theory evolved around the hegemony of Western colonialism. Whilst Freire brought critical scholarship to Latin America, language barriers as well as the prevailing Western dominance have largely prevented critical scholarship from being unearthed in East Asia (Ryoo & McLaren, 2010).

author's translation)⁴² through which labour can knock down those socio-cultural, economic-financial and political-institutional structures which keep them under the oppression of capital.

Thus, both Freire and Negt share a dedication to growing citizens' political activism and facilitating humans to emancipation in both collective and individual terms. Emancipation means, for Negt (2010, 2012) and Freire (1973, 2002), the learning process required to liberate oneself from dependencies and subordination – whether imposed by self or others – while increasing social justice, autonomy and freedom. After all, freedom is “the indispensable condition for the quest for human completion” (Freire, 2002: 47) and, as such, is crucial to both labour revitalisation and liberation from capitalist oppression.

Liberation is a painful process because it often leads through crises, which are both a life elixir for capitalist growth and a foundation of emancipation. In order to make people understand the personal, organisational and structural mechanisms that have resulted in particular personal experiences, critical-emancipatory pedagogy needs to confront the learner with uncomfortable individual and collective emotions and behaviours, such as fears, insecurities, disorientations, desolation, resignation, “frustrations, arousals, conflicts in life and between cognition and emotion, constraints and hardened attitudes”, feelings of powerlessness and their manifestations in certain perceptions, language, class-specific personality structures, defence mechanisms as much as compensation through consumption, narcotisation, etc. (Negt, 1974: 21).

Moreover, vital for the emancipation-seeking worker is realising that citizens' disorientations, insecurities and hopelessness are the fundamentals for developing politically authoritative attitudes. Politics, conversely, is characterised by power, violence, rules and regulations, law, oppression, constraint, conflicts of interests and desires, disputes, battle and war (Hochheimer, 1962). Arguably, these characteristics are attractive to only particular humans, namely quite destructive, or in Fromm's words, necrophilic persons (see chapter 2). One matter of politics is vocational training. The emancipation-seeker must understand that vocational training aims at moulding already young workers to submit to authority and make them accept subjugation as allegedly inevitable as neoliberal capitalism. As a result, people are likely to feel an inner conflict between the rather passive role of employee and the supposed active role of a democratic citizen that liberal education encourages (Dera, 2006).

Eventually, the emancipation-seeker needs to realise that capitalism being challenged “needs to start with self-sacrifice”, in particular by reducing the selfishness upon which the system feeds (Salt, 2000: 138). Reducing selfishness might include, for example, reducing some union leaders' extensive remuneration packages (Haas & Esslinger, 2010; Higgins, 2012; McConnell & Quinlan, 2012a, 2012b; Chapman, 2012; TaxPayers' Alliance, 2011; Unite, 2014).

⁴² In original: “system-sprengende Praxis”.

It follows that crucial for critical pedagogy to effect transformative action is leading learners into emotional and spiritual pain that may or may not previously have been repressed. "People [...] must feel so frustrated, so defeated, so lost, so futureless in the prevailing system that they are willing to let go of the past and chance the future. This acceptance is the reformation of any revolution" (Alinsky, 1989: xix). In essence, pain provides power for revolutionary change.

Through the alternatives that critical-emancipatory education develops, learners are supported in clearing their pain, solving inner conflicts and turning illusions into realities. In the process, learners are facilitated in discovering their true selves. Once the "mental and spiritual deformations" are cured through reconnecting to self, others and nature, human intelligence and consciousness can flow (again), attitudes have room to be changed and perceptions of resignation and powerlessness can be overcome (Negt, 1974: 93 author's translation).⁴³ With this (renewed) energy, are placed in a position to fight for labour and human rights.

In sum, this PhD project centres on two pedagogical approaches, which are constructivism and critical pedagogy. Both will be visible in the empirical part and act as a means to assess which pedagogy trade unions and their trainers tend to follow.

3.3.3. Resources

Besides intra-union relations, access to resources can constrain or enlarge the reach of trade union education. Trade unions have access to both external and internal resources. The former include mostly financing and legislative backing from government. Since education is a global and European fundamental right, as mentioned above, national governments may provide for laws that allow workers and their representatives time off for training. If such laws are absent, employers may grant educational leave locally. Table 3-3 summarises the possible ways to access educational activities, categorised for the later empirical findings.

Table 3-3: **Different Routes to Trade Union Education**

	Government	Employer
<i>formal</i>	(Paid) educational leave legislation	Collective agreement
<i>informal</i>	-	Course-by-course

Source: own illustration

⁴³ In original: "psychische und geistige Deformation".

The question remains whether educational leave is paid or not. ILO Convention 140, 1 entitles workers to participate in education and training “for a specified period during working hours, with adequate financial entitlements”. As will be noted in chapter 5, Germany has ratified this convention whilst Ireland has not. Therefore, both countries differ profoundly in their provision of access to trade union education.

Financial resources are, likewise, internal to trade unions through membership and affiliation fees. Other important internal resources are time and staff (Kurzer et al., 2006). Due to the general membership decline in Europe since the 1980s, financial resources for trade unions have been decreasing. Consequently, money to maintain and hire educational staff has been shorter. Fewer trainers and administrators leads to not enough labour power for educational activities and limits the time that trade unions can invest in labour education. The decrease in resources puts trade unions in a defensive position (ibid).

In this position, trade unions may copy the behaviour which is usual in capitalist circles and reduce investment: “when budgets are cut, training is one of the first areas to go” (Stirling, 2002: 35). If education is not abandoned completely, educational activities are often reduced to serving the organisational core business of collective bargaining, interest representation and mobilisation, whilst investments in broader social, economic and political circumstances through political education are decreased (Dörre, 2002). In other words, limited resources result in limited union education, or ‘ökonomische Zweckschulung’. As a consequence, trade union education is prevented from reaching its transformative potential (Salt, 2000). To what extent trade unions prioritise training will be measured in the empirical parts III and IV by the amount of money as well as the share of fees which unions invest in trade union education.

In addition to and because of this lack of material resources, immaterial resources like the perceived lower priority of trade union education as well as the consequent lack of educational strategy may be deficient, too. In fact, Negt (1974), Forrester (2010) as well as Bürgin (2014) find missing an organisational strategy regarding trade union education.

In short, resources are key to trade union education. Therefore, trade unions’ external and internal resources are measured in the empirical chapters.

3.3.4. People

Corresponding to his abovementioned concept of ‘critical’ and ‘naïve consciousness’, Freire (2002) distinguishes between critical and naïve thinkers. Whilst the former aim at continuous transformation of the present in the pursuit of the human vocation of humanisation, the latter prefer accommodation to the present as an improved version of the past. Siegel (2010: 143) proposes that critical thinkers are “a certain sort of person [with] particular dispositions, attitudes, and character traits, as well as [...] particular skills and abilities”. Besides the ability to probe the strength of reasons, critical thinkers tend to be open- and fair-minded,

independent, intellectually modest and humble, explorative and respectful of others. Matching Sayer's (2011) idea of 'emotional reason' (see chapter 2), critical thinkers own a combined "reason-assessment component and a dispositional, critical spirit component" (Siegel, 2010: 142). In addition to their critical knowledge and special attitudes, their particular skills enable critical thinkers to take transformative action.

However, "transformations in individuals or whole groups can be disturbing to people for whom the status quo is the desired condition" (McWhinney & Markos, 2003: 20). The relation between critical and naïve thinkers is, hence, supposedly quite conflicted due to their differences in personality and goals. Thus, a tension exists between proponents of 'education for compliance' and 'education for transformation' (Cole, 2005) and, respectively, advocates of cosmetic change/reforms and revolutionary/transformational transformation.

3.3.4.1. Participants

With the concepts of accommodation and transformation in mind, trade union education can develop different kinds of workers, labour representatives and citizens. Westheimer and Kahne (2004) distinguish between *personally responsible*, *participatory* and *justice-oriented* citizens. Building on this framework, Christine Zeuner (2012) shows the different educational theories, didactical and methodological approaches, learning objectives, values concerning citizenship and the results of using these methods in courses for each of the three kinds of citizen (Figure 3-1).

Figure 3-1: **Different Kind of Citizens and Their Types of Education**

	Personally responsible citizen	Participatory citizen	Justice oriented citizen
Educational theory	<ul style="list-style-type: none"> • Positivism 	<ul style="list-style-type: none"> • Humanism/Pragmatism (John Dewey) 	<ul style="list-style-type: none"> • Critical Pedagogy/Critical Theory (Paulo Freire)
Didactical approaches	<ul style="list-style-type: none"> • Adaptation: Students are taught a particular set of national values and norms (e.g., that current political structures are the best ones possible). 	<ul style="list-style-type: none"> • Integration: Students are taught how to participate and become active citizens. 	<ul style="list-style-type: none"> • Critical thinking: Students are encouraged to ask questions, to critically analyse the established system and its power structure.
Methodological approaches	<ul style="list-style-type: none"> • “learning by doing” (individually) • Support of individual social action 	<ul style="list-style-type: none"> • “learning by doing” (collectively) • Internships, engaging in civic projects 	<ul style="list-style-type: none"> • “learning through ex-amples” (change-oriented) • Political/social action outside mainstream organisations/structures
Learning aims	<ul style="list-style-type: none"> • Instrumental 	<ul style="list-style-type: none"> • Participative 	<ul style="list-style-type: none"> • Transformative
Values concerning citizenship	<ul style="list-style-type: none"> • Citizenship is based on a universal national identity. 	<ul style="list-style-type: none"> • Aim of citizenship is national identity but the existence of diverse cultural identities. 	<ul style="list-style-type: none"> • The notion of citizenship as being diverse is an accepted and sought after principal.
Result of courses	<ul style="list-style-type: none"> • Awareness of individual responsibility • Relatively low level of knowledge concerning participatory rights 	<ul style="list-style-type: none"> • Awareness of individual responsibility within the social context • Relatively high level of knowledge concerning participatory rights (micropolitics) • Relatively low level of knowledge concerning political, social and economical interdependencies (macropolitics) 	<ul style="list-style-type: none"> • Awareness of collective/global responsibility • High level of collective political and social responsibility • Relative low level of knowledge concerning participatory rights and possibilities of interference

Source: Zeuner (2012)

The above figure illustrates that trade union education can create, on the one hand, members who adapt to current social, political and economic structures in that they take individual responsibility for living by the national values and institutions which are ‘sold’ to them. This type of member appears rather passive and uninterested in collective learning and action. Participatory trade unionists, to the contrary, favour taking action and learning collectively. Their understanding of individual responsibility is to actively fit into current structures, since they appears not to know much about them. Instead, they seem to be experts in participation rights and opportunities. As opposed to the ‘personally responsible’ trade unionist, the ‘participatory’ union member accepts diversity in national and probably other identities but focuses within the national institutional context for a sense of identity.

It follows that trade union education, which aims at developing these two member and citizen types, contributes to maintaining the status quo. The present state of capitalist democracies around the world is marked by social inequality, ‘democratic deficit’ (Erne, 2008) and environmental destruction, albeit to different extents. Trade unions outspokenly claim to fight against the first two conditions and appear to slowly be considering the latter as well. What they officially fight against, moreover, is capital. Capital in form of corporations, supply

chains and finance streams is, however – as much as social inequality, flawed political systems and ecocide – a global issue. Hence, trade unionists with membership identities that do not span across national borders cannot be successful in achieving what they claim to pursue.

In sum, there are three educational approaches towards participants: forming 'personally responsible', 'participatory' and 'justice-oriented' citizens. These three categories match the earlier mentioned suggestion that the existing philosophies of education develop Conservatives, Reformers and Transformers. As argued above, in order to enhance transnational labour action, trade union education needs to form more Transformers.

3.3.4.2. *Educators*

In addition to course participants, educators have a vital role in facilitating the change from 'accommodation/compliance' to the 'transformation' of social, economic and political structures. Depending on their perception of the purpose of trade union education and their roles in the learning process, educators can help individuals and groups to develop on the range between 'personally responsible' and 'justice oriented' citizens, rather than as passive information receivers and active problem solvers.

Freire (2000, 2002) distinguishes, for example, between the *banking educator* and *democratic educator*. The former is an expert who disposes as much information as possible into the allegedly empty learner. In line with the liberal and behaviourist educational philosophy, the trainer/teacher/lecturer is the subject who presents encyclopaedic knowledge, whilst the participant is the object who listens and is believed to know nothing. The teacher chooses the learning path to which the learner complies. The direction of growth is from the outside to the inside, as the teacher fills up the learner with information.

The 'democratic educator', to the contrary, does not speak *to* people but *with* them (Freire in Bell et al., 1990: 180 emphasis in original). Such an educator is a tutor/mentor/coach who co-constructs the learning path in dialogue with the learner. As opposed to the hierarchical teacher-student relation which the banking educator establishes, the democratic educator meets learners on eye-level and attempts to raise them up. Democratic educators may exert authority, but not authoritarianism. In other words, they take leadership if necessary, but not for the purpose of controlling the learner. Rather, they lead the learner in personal development towards a truer sense self: "what the educator does in teaching is to make it possible for the students to become themselves" (Freire quoted in Bell et al., 1990: 181). The direction of growth is inside-out, because the tutor facilitates the learners to unfold their potential.

In order to develop trade union members and citizens who question existing power structures and systems, critical-emancipatory education is needed. As outlined earlier, crucial for critical-emancipatory education is 'Zusammenhangswissen' (connected knowledge)

(Bürgin, 2014; Scherbaum & Ludwig, 2006) on, for instance, the processes and consequences of the globalisation of production, the dismantling of social security, work intensification, competition for labour costs, workplace rights, etc. (Cole, 2005; J. Taylor, 2007). The skills required to apply this connected knowledge are stimulated through active learning methods. For motivating learners to utilise their knowledge and skills beyond the classroom as well, educators also must address the participants' attitudes. To do so, "you have to tie the practical with the visionary" (Horton quoted in Bell et al., 1990: 177).

Arguably, the democratic educator is much more suitable than the banking educator for providing critical-emancipatory trade union education. So, progressivist and humanist educators have needed to change their educational philosophies in order to contribute to preparing learners for transformative action (Sarbo & Wang, 2004).

3.3.4.3. Union Leaders

In addition to preparing for transformative action, critical-emancipatory education may also challenge union members' view of their organisations and leaders. Through emancipating members, unions may fear losing them (Bürgin, 2014), for they might, for example, be disillusioned about the effectiveness and efficiency of the organisations to which they pay membership fees.

What reminds one of capitalist-style union behaviour is an instrumental view of education and training as a transferral of information that serves the union organisation. Outlined earlier as 'union education', Negt (1974: 36) calls this phenomenon trade unions' "ökonomische Zweckschulung" (utilitarian training for economic purposes). The purpose of "union education," again, is to train workers and their representatives to solve conflicts locally in companies instead of, for example, educating labour to solve the conflict's root causes at the national and even international level. Therefore, trade union education is "betriebsnahe Bildungsarbeit" (ibid: 36, education close to the company), for instance, providing knowledge on social policy, wage negotiation skills and other immediate economic interests.

Any form of "Vereinseitigung" (one-sidedness), however, must be avoided (Scherbaum & Ludwig, 2006: 58). Union leadership that decentralises trade union education to the local level without connecting it to a wider, cross-level union organisational strategy is unlikely to lead to radical changes. However, radical changes and political conflict may not be what trade union leaders want (Negt, 1974).

If union management prefers to maintain their organisations as 'kind and well-behaved' political actors, labour leaders must review their understanding of educational 'purpose'. More exactly, they need to expand it in order to create a more encompassing and long-term purpose for labour education. So doing, Gallin (2014: 118) suggests, means to "recover an ideological and political base that is long lasting and solidly grounded". Ahlheim (1993) highlights that not

only 'Handlungsperspektiven' (perspectives to act), but also 'Denkperspektiven' (perspectives to think) can be liberating. The purpose of trade union education should certainly be aligned to the needs of human beings rather than organisations (Bürgin, 2014). As noted above, this would mean providing education on knowledge, attitudes and skills which address all four human elements.

But, do workers and their representatives actually perceive the need for education that goes beyond tool training for immediate use in the company? Different forms of individual commitment, social character, and identity, as illustrated in chapter 2, influence personal perceptions of educational needs.

Indeed, the relations between rank and file and union leaders within and between union organisations may vary depending on individual perception of the purposes of trade union education. In order to improve transnational labour action, trade unionists must not reduce education to a functional tool for organisational capacity building, but should view it also as a normative means to develop themselves as human beings who have lives outside the trade union.

Conclusion

This chapter explored the concept of education generally and trade union education in particular. The different fields mapped out provide a basis for categorising and analysing the empirical findings in the later part III and IV.

Education is a fundamental right globally according to Article 26 of the Universal Declaration of Human Rights (UDHR) and in Europe through Article 14,1 EU Charter of Fundamental Rights. Etymologically, education has both a functional and a normative purpose. On the one hand, human beings train and mould themselves and others for a specific aim. This aim can be in the service of the social elite (top-down domination) as well as of the individual (bottom-up emancipation). On the other, human beings may strive to lead and develop themselves and others on their path towards their vocations and, hence, their true selves. This double meaning of education is mirrored in Sayer's (2011) idea of 'sense of duty' and 'sense of love' (see chapter 2).

Due to the dominance of neoliberal ideology in Europe and the world, however, compassion for self and others is suppressed by market forces. The meaning of education seems, therefore, reduced (almost) exclusively to functional purposes. Allegedly common goods like education have become increasingly tools in the service of the economy.

The educational philosophy which underlies the functional view of education for economic growth is called behaviourist. Likewise functionalist in nature is the liberal philosophy which sees education as mind sports with the aim to train the subject for rational reasoning and physical self-control. The more intellectual power one has, the more allegedly liberated is his

mind. The humanist philosophy, by contrast, puts the 'sense of love' first, for developing the potentials of self. Free citizenship and social change in the form of reforms are considered the outcome of continuous learning. Assuming that everybody feels the duty to make the best of themselves, current circumstances are considered the optimum. Hence, there is little need to question the present, but trying to improve it within the structures given is allowed.

Similarly, the progressivist philosophy strives for social change through reforms, yet not through everybody individually. Rather, the individual is enabled to solve problems in and through community. The 'sense of love' appears, therefore, more directed to others than to self. The community is supposed to be democratic, and it is everyone's duty to improve self and society in pursuit of democracy. To build and maintain democracy, people are educated over their lifetimes to think critically and creatively and to reflect on self and others.

Critique and creativity, as well as reflection and action, are all concepts in the radical philosophy, too. Like the humanist and progressivist philosophies, radical pedagogy is future-oriented and advocates democracy. For all five educational philosophies, education is a quest for freedom. However, the radical philosophy goes furthest in imagination, deepest in change and can lead people to genuine democracy and liberation, arguably.

Radical education facilitates utopian dreams, where the ultimate utopia is the humanisation of man. Humanisation is not a dream, but seen as man's vocation. Originating from a love for humanity and being human, which is both individual and collective, the duty arises to eliminate everything which hampers humanisation. Therefore, democracy is understood as a creation by the majority of citizens for the benefit of all instead of as a construction by a small social elite for the benefit of themselves. Critical and creative thinking is considered to empower people to uncover fundamental flaws that prevent true democracy and its values – human dignity, solidarity, equality and freedom – from being lived. As opposed to reforms of institutions within given systems, radical education aspires to transformation of the present systems.

In this chapter, I suggested that from the five educational philosophies emerge, broadly speaking, three groups of mind-sets: *Conservatives*, *Reformers* and *Transformers*. In some ways, however, also the Reformers may be sorted among the Conservatives, since they maintain existing frameworks. What they change is only the picture one holds of the present's acceptability.

Despite their differences, all three characters see the same goals for education: namely, individual freedom and autonomy as well as the survival and development of society. Differences in their assumptions about the aims of education reflect the individual and collective understanding of what kind of society is desired and what it means to be human. Whilst Conservatives see emancipation and liberation as a privilege for the ruling class,

Reformers and Transformers, especially the latter, consider all citizens eligible and responsible for personal and social development.

In all philosophies, we can identify the 'four pillars of learning' which the UNESCO (2014) suggests are important: i.e., learning to know, to do, to live together and to be. In this view, education may be a means to foster people as much as societies in their intellectual, psychomotoric, emotional and spiritual growth. The four pillars of learning resemble and are arguably supposed to address the four human elements of mind, body, heart and soul (see chapter 4).

Therefore, trade union education must address all four human elements if labour wants to renew a national and international movement. The body element stands for union/class action (Klassenkampf), such as through (trans)national collaboration and developing the tools needed therefore. The mind represents knowledge (Klassenwissen) and the commonalities and differences among industrial relations systems. The heart embodies emotions, most importantly solidarity (Klassengefühl). Finally, the soul is the basis for imaginations that picture alternative organisations of society, economy, politics and the treatment of nature. The alternatives are based on labour values like justice, equality, democracy and sustainability. Crucial for learners is to understand how these four fields are connected – in other words, how oppression and injustices are created in economy, politics, and society and reinforced through certain tools and structural, organisational and personal shortcomings.

Thus, trade union education requires providing knowledge, attitudes and skills which, utilised together, can build a distinct labour culture and offer labour an orientation to act. Put differently, through trade union education, workers' heads, hearts and hands are facilitated to create a labour spirit based on alternative interpretations of the world.

To facilitate labour in proposing alternatives and pushing actively for them, trade union education must adopt an appropriate pedagogy. Predominant among these are the humanist and progressivist philosophies. Suitable for labour renewal, for (trans)national trade union education as well as for improving international labour and human solidarity, seems only the radical educational philosophy, however, from which a critical-emancipatory approach to education is established. Critical pedagogy is holistic as it touches upon all four human elements: it is cognitive (connected knowledge, alternatives), affective (suffering, fears, hopes), spiritual (utopian visions of a class-less society and the humanisation of man/human completion, values of equality, justice and liberation from oppression) and active (counter-hegemonic actions).

Crucial for critical pedagogy effecting transformative action is leading learners into emotional and spiritual pain that may or may not have been repressed so far. This pain is a powerful source for revolutionary change. The bigger the suffering, the bigger the power and hunger for revolution and freedom. Critical-emancipatory education, thus, underscores the

idea that labour mobilisation and transformative action spring from people's hearts and souls (see chapter 2). Important for labour and human solidarity is that workers feel the desire to improve not only their own situations but also the working and living conditions of an 'imagined community' of global labour, human society and nature (ibid).

Critical labour pedagogy needs to be applied in the two strands of trade union education – i.e., to union staff and members. Spencer (1998) and Taylor (2007) suggest that there are different types of trade union education: union education, labour education, and workers' education. Traditionally, the aim of workers' education was building a distinct class consciousness through analysing critically economic and social circumstances and proposing alternatives in light of Marx's Communist Manifesto. This part of trade union education, which might be called ideology and value training, has diminished the more trade unions have pushed for building national institutional frameworks.

Workers' education must not be confused with worker education, however. The latter means training for employability, most through vocational training. Vocational training is traditionally not part of trade union education, but trade unions today may also engage in employability training.

Depending on the type of unionism and the 'eternal Hyman-triangle' between market, class and society, trade union education programmes can be expected to meet the abovementioned assumed educational purposes and human elements to different degrees and understandings. It was suggested that

- market-oriented unions focus their education programmes more on skills training for union membership and members' employability (concentration on the hand/body);
- society-oriented unions are more likely to concentrate on knowledge on events and issues (concentration on the head/mind),
- class-oriented unions can be expected to emphasise union and class consciousness (concentration on the heart).

As a result, different union types will develop different labour spirits – i.e., organisational and workers' ideologies, or souls – as much as different cultures of trade union education.

For facilitating transnational labour collaboration and, eventually, labour renewal through education, trade union education will have to develop participants' knowledge, attitudes/consciousness and skills to equal amounts. This means placing trade union education not at some point on the sides of the 'eternal Hyman-triangle' but in its centre.

Parallel to the increased commodification of education, trade union education has moved towards a market-orientation. A shift from a broader political education towards a focus on skills and competency training is evident, and this has been a consequence of union leadership and tighter resources. Trade union education is, thus, in danger of being reduced to

'ökonomische Zweckschulung'; that is, to limiting educational activities to those that serve the organisational core business of collective bargaining, interest representation and mobilisation whilst broader insights into social, economic and political circumstances are neglected. Since cross-border collaboration is not perceived within unions' core business understanding, the field of transnational labour education appears quite unexposed in both academia and in trade union praxis. Trade unions' educational collaboration across borders usually remains limited to specific projects.

Problematic in this shift is, moreover, that competence can be interpreted narrowly in terms of cognitive abilities (i.e., the head). It was also argued, therefore, that the measurable competence view may undermine a critical-emancipatory debate which is key to building a labour consciousness based on alternative opinions and aims. Likewise, union management that decentralises trade union education to a company level without connecting it to a wider and equally important cross-level organisational strategy is unlikely to lead to radical changes. Thus, trade union education would be prevented from reaching its full transformative potential.

Trade unions' orientation towards competence development does not have to reinforce neoliberal education for compliance, however. It is a matter of how the competence is understood and utilised. As will be shown in the following chapter, Transnational Competence (TC) demands a wide and variable range of knowledge, attitudes and skills, and is an example of how competence orientation and critical pedagogy can complement each other very well.

But do workers and their representatives actually perceive a need for education that goes beyond tool training for immediate 'firefighting' in the company? Different forms of individual commitment, social character, and identity, as were illustrated in chapter 2, certainly influence personal perceptions of educational needs.

Corresponding to the distinction between Conservatives and Transformers noted above, Freire proposes a dichotomy between people with naïve and critical consciousness. What trade unions urgently require in order to meet their organisational and representative mandates as well as their proclaimed visions of social justice, democracy and the sustainability of nature are critically conscious people who actively strive to challenge present social, political and economic systems and who provide viable alternatives which bring closer to humanisation both the world of work and of humanity.

Improved versions of the past, such as through reforms and other cosmetic changes, are not sufficient to conceal the fundamental flaws of neoliberal capitalism, which includes the destruction of nature through exploitation of resources (including labour power), the destruction of societies through inequalities and existence-threatening competition, the destruction of political systems like democracy through evading social regulations, taxes, etc. while stretching public funds to bail out economic mismanagement and, finally, the destruction of itself through its belief in unlimited growth.

In addition to workers' motivation for critical consciousness, trade union education requires trainers who facilitate learners to develop it. Freire (2000, 2002) distinguishes between the 'banking educator' and 'democratic educator'. For establishing 'connected knowledge' and critical-emancipatory debate, as well as reflection and action upon the structural, organisational and personal defects in the world of work as much as human society, the former are unsuitable whilst the latter needed.

4. Chapter: Transnational Competence

The thesis attempts to define the extent to which trade union education in Ireland and Germany and at EU level fosters labour representatives' transnational competencies, and it searches for major challenges to achieving that. After providing an overview of factors which may foster or hamper labour's cross-border activities (chapter 2), chapter 2 outlined the theory of trade union education. This chapter is about the specific kind of education which seems most suitable to improve cross-border labour action.

'Going local' in more than one country appears particularly important today, and probably even more so tomorrow. Economic and political globalisation, in combination with technical innovation, have made our world highly interconnected and interdependent while it changes at fast speed. This trend seems unlikely to stop. Rather, distances in time, space and culture will continue to narrow. National borders will become more and more permeable. Due to this increased openness, the number of people who seek a transnational life style has increased notably (Koehn & Rosenau, 2010). The number of TNCs has also risen sharply during the last three decades (see chapter 2).

Through this amalgamation of individuals from different economic-financial, political-institutional, socio-cultural and environmental backgrounds and experiences, national societies as well and company staff have become increasingly diverse. At the same time, people from one and the same country cannot be categorized together, as there are often considerable local differences within a country. For example, Germans from Schleswig-Holstein in the North talk differently from the Bavarians in the South. People from the former East are still different from those in the West, even 25 years after reunification, not just in linguistic terms. Similar cultural distinctions can be noticed.

So, what tool can labour use to maintain relations of collaboration and solidarity with people within and outside their national movements? The concept of Transnational Competence (TC) might help in this respect and shall, therefore, be introduced in this chapter. After defining the term, it is outlined where the concept stems from, what it and which characteristics it features. Essentially, TC comprises five competencies: *analytic*, *emotional*, *creative/imaginative*, *communicative*, and *functional*. The concept is said to be *relative*, *contextual* and *holistic*.

TC, the conclusion shows, has been rather limited to functional-instrumental purposes – in other words, to the service of the economy (see chapter 2). As such, it appears unsuitable for critical-emancipatory trade union education. The author, therefore, suggests extending the TC framework by a sixth sub-competence, named *transformative*. Moreover, a new order of the six competencies, as well as a new and coloured arrangement of them, is proposed. It shall also be illustrated why TC is more inclusive than its founding fathers suggest.

4.1. Definition

The term 'transnational' means beyond national boundaries. It implies both direct and indirect connections and interactions between people from different nations, whether in private or professional terms (Kehrbaum, 2010). It, likewise, implies that people behave across borders in accordance with respective local formal and informal rules, which may change over time.

This conception of 'transnational' corresponds to the earlier introduced notion of transnational personal identity as well as to transnational corporation. Whilst the former was suggested to mean having one's feet at least in two societies, a Transnational Corporation (TNC) is defined by the United Nations Conference on Trade and Development (UNCTAD, 2012) as "an enterprise comprising entities in more than one country".⁴⁴ These entities may be based in direct neighbour states or within a region such as Europe, Africa or Asia, or among countries on different continents. Koehn and Rosenau (2010: 6) sum up that the term 'transnational' "captures the diversity and multiplicity of contemporary domestic-foreign boundary exchanges without requiring global reach".

'Competence', meanwhile, is defined by the OECD (2005: 4) as the "ability to meet complex demands". In addition to knowledge and skills, this ability includes certain "psychosocial resources" summarised in the word 'attitudes'. The competence owner is asked to mix and match these three items appropriately according to the situation (ibid).

One of the most important German social scientists, critical thinkers and leading figures in political education has a very similar conception. Following Johannes Weinberg, Oskar Negt defines competence as a triangle of "Fähigkeiten, Wissensbestände und Denkmethode" (abilities, bodies of knowledge and methods of thought) which an individual develops and applies throughout a lifetime (cited in Negt, 2010: 222). It can be acquired anywhere, at any time and in any way (ibid).

Merging these two notions, 'transnational competence' shall be defined as a *complementary composition of knowledge, attitudes and skills which enables human beings to interact autonomously and responsibly beyond national boundaries with respect, as equals and in kindness*. As such, it may facilitate people 'going local' in respect to other countries.

4.2. Origin

Misunderstandings and other challenges to human interaction can occur even if individuals are from the same area. The probability of turbulence is even higher if these persons are from different countries. For corporations, disorder is, however, a source of inefficiencies and managerial mistakes, and they may lead to higher costs and less profit. To make transnational

⁴⁴ Whether there is a difference between international, multinational, global and transnational companies does not seem unanimous. Although different definitions exist, these words are often used interchangeably.

human relations as smooth as possible and diversity a corporate asset rather than a restriction, people require appropriate skills.

Given this, the Institute of International Education (IIE) in New York initiated a project on the educational exchange between the US and Japan and asked a group of 13 university professors and organisational leaders from these two countries – who composed the Task Force on Transnational Competence – to rethink current policies, practices and procedures. Transnational Competence (TC) was, thus, born shortly before research on it started in 1994, but it did not become public as a concept before the final report was published in 1997. Koehn and Rosenau (2010) found that this IIE report is the earliest resource highlighting the term.

In its original form, TC was understood as “the ability of individuals, organizations, communities, and governments to effectively cope with the rapidly changing transnational environment and to realize their goals” (IIE, 1997: 5). In order to cope effectively, the Task Force members suggested five core elements, as follows:

- the “ability to imagine, analyze, and creatively address the potential of local economies/cultures;
- knowledge of commercial/technical/cultural developments in a variety of locales;
- awareness of key leaders (and ability to engage such leaders in useful dialogue);
- understanding of local customs and negotiating strategies;
- facility in English and at least one other major language, and facility with computers; and
- technical skills in business, law, public affairs, and/or technology, and awareness of their different nature in different cultural contexts” (ibid).

In the follow-up publication, Hawkins and Cummings (2000) did not develop their concept further.

Two professors at the University of Montana and Washington, Koehn and Rosenau (2002), shared the notion of ‘transnational competence’ but, in contrast to Hawkins and Cummings (2000), identified a set of analytic, creative, communicative and technical skills. Further research across the disciplines of cross-cultural psychology, development studies, intercultural communication and international business provided the political scientists with the means to extend the IIE’s initial framework considerably. Most importantly, they introduced an emotional element and added behavioural aspects to the communicative and technical spheres. Thus, Koehn and Rosenau (2002: 105) suggested a “new framework [that] provides analytical groundwork for explaining why some people, groups, and networks are more effective than others in forging meaningful transnational solidarities”.

As of yet, Transnational Competence comprises five sub-competencies: *analytic*, *emotional*, *creative/imaginative*, *communicative* and *functional*. Every sub-competence includes four to six single abilities. It is a “clearly differentiated, internally homogenous, and collectively

exhaustive” set of skills, Koehn and Rosenau (2002: 109) state. It was adapted through research on transnational health care encounters by Koehn (2004) and fully operationalised in Koehn (2005) for assessing the interactions between medical practitioners (doctors/nurses) and migrant patients in five Finnish reception centres. In its most recent and slightly refined version, Koehn and Rosenau (2010) present TC as a comprehensive and innovative educational platform for empowering individuals to act globally.

To give an accessible impression of the more elaborated TC framework, Table 4-1 provides short definitions of each sub-competence. The order from top to bottom is kept as in original.

Table 4-1: **Transnational Competence (TC) in Brief**

Competence	Definition
<i>Analytic</i>	Understand an issue, link it to the situation of self, other and the wider context, assess alternatives, discern possible strategies and learn from past experiences.
<i>Emotional</i>	Be open for new experiences, empathic about others’ situation, confident with multiple identities, perceive efficacy of self and transnational action.
<i>Creative/Imaginative</i>	Envision potential commonness in diversity, create new transnational syntheses, imagine mutually sustainable alternatives, source inspiration from various cultures.
<i>Communicative</i>	Speak and write others’ language, act as interpreter respectively utilise interpreters, be familiar with culturally different cues and codes, receive culturally different messages, hold meaningful dialogues and support others to open up, prevent and clear up misunderstandings.
<i>Functional (project/task)</i>	Develop constructive human relationships, apply and adjust the five competencies during transnational interactions, put organisational strategies into practice, solve problems and conflicts, achieve goals, access resources.

Source: Koehn & Rosenau (2002, 2010); own illustration

Analytic competence includes, for instance, understanding a transnational counterparts’ power structures and decision-making processes, linking local circumstances to global issues and evaluating the conditions under which cross-border action might be effective and efficient. Emotionally competent people are, essentially, self-confident, develop multiple identities and embrace the unknown and uncertain. They also pay respect to others and are genuinely interested in others’ lives. Creativity and imagination in transnational interactions means generating innovative ideas and opportunities for how interdependencies can be solved so that all actors involved are satisfied. Communicative competence comprises proficiency in verbal and non-verbal language with the aim to engage in meaningful interactions. Functional competence is the application of the previous four abilities and access to resources to maintain

transnational interactions. The framework, as such, appears quite general and, hence, transferable to many education areas.

Before the TC framework can be applied to trade union education, however, we must know more about the characteristics which all five competencies have in common as well as the framework's limitations.

4.3. Qualities: Relative, Contextual and Holistic

Koehn and Rosenau (2002, 2010) propose that TC has three characteristics: *relative*, *contextual* and *holistic*. Since the two authors cover these characteristics briefly, the section below provides more detailed exploration.

4.3.1. Relative

Firstly, Koehn and Rosenau (2002) want us to bear in mind that Transnational Competence will never be fully realised. The reason for this is that TC will present itself in as many different forms as people exist. One person may be able to cover all five dimensions, whereas another might have abilities in just one. For instance, person A may be a great analyst, be open to new encounters and blessed with ideas, successful in solving conflicts and a keen networker. Person B, instead, might not but might have the right personal, collective and social identities, and be open to change and personal development. Person B is, therefore, likely to be much more competent in the emotional area than person A. While person B lacks breadth in competencies, they might be able to compensate for this shortcoming with depth. As a result, person B might be conceived more as a specialist, while A's qualities may appear to be those of a generalist.

Likewise possible is the following: person A is expert in the analytic area but is not much of a communicator; that is to say, person A has difficulty understanding non-verbal cues and codes as well as listening to and discerning different messages. It is conceivable that, under certain circumstances, person A's strength in analytic competence can outweigh weaknesses in the communicative sphere. This may be the case in a group environment where there are colleagues who are more skilful in communicating and can make up for A's deficiency. It might also be that communicative abilities are not relevant at a point in time where figures can speak for themselves. Person A might be an eloquent writer, however, or might know how to adeptly utilise an interpreter.

It seems, hence that, to a certain extent, some abilities of TC can be compensated for with the talents others. More exactly, such social compensation is possible across competencies and within them. Eventually, TC practitioners can develop a unique composition of the five sub-competencies regarding breadth, depth and compensation.

Subsuming the different forms of TC discussed so far into a formula, we may say that one's individual transnational competency profile (TCP_i) will be a distinct mix of (1) the range of competencies (horizontal), (2) the intensity of each competence (vertical) and (3) the kinds of competencies (cross-dimensional). We may transfer this logic to groups of people. Depending on which individuals are in a group, a group will have a distinct collective transnational competency profile (TCP_c).

Theoretically, the number of possible combinations and compensations of sub-competencies is large. Practically, within this frame of possibilities, a personal competency profile is supposed to vary over time through learning, developing and unlearning knowledge, attitudes and skills. Koehn and Rosenau (2002: 116 emphasis in original) would, hence, agree to seeing Transnational Competence Profiles "along a continuum" between *incapable* and *proficient*, including the intermediate states of *pre-competent* and *adequately competent*.

The scholars' imagination of the competence continuum seems familiar, however. It is reminiscent of the grading and assessment systems not only present in schools and universities, but also on the belts of martial artists in Kung Fu or Capoeira or the Total Quality Management (TQM) experts in Six Sigma.

The difficulty with such a picture of TC competency is threefold. Firstly, who evaluates the state of transnational competency? So far, there is no institution to do so. For the time being, the competence users and the people surrounding them take the role of evaluators. Due to such subjectivity, those who may seem quite proficient to some can appear pre-competent to others. Those who may consider themselves absolutely incapable in one situation may regard themselves as fairly competent in another, and vice versa (Koehn & Rosenau, 2010).

If there was available a more objective evaluation from an independent authority, the second question is, how should TC be measured? Would there be exams in oral and/or written form? Over what time period? How many examiners are on the evaluation panel and how transnationally competent are they?

The third difficulty with Koehn and Rosenau's (2002) competence continuum is their implicit view that this continuum is finite. It seems that once a person is perceived or perceives himself as 'transnationally proficient', he is finished with TC education. This, however, is an illusion. Arguably, the point is rather the start of a lifelong process of improvement and adaptation.

Koehn and Rosenau (2010: 17) must have come to a similar realisation some years later. They have altered their view on the competence continuum and opened it towards the need for ongoing personal development: "aspirations to become transnationally competent require commitment to a lifelong learning process", or what Negt (2010: 177 emphasis in original) prefers calling "*Leben begleitendes Lernen*" (life accompanying learning). In other words, one would have to develop TC continuously along a learning curve or continuum without ever

arriving at an endpoint. Hence, transnational competence is not the goal. Rather, the journey towards improving personal performance in cross-border situations is the destination.

As TC education never finishes – unless a person dies or chooses to withdraw from TC education purposely – it is, likewise, impossible to complete the development of all the sub-competencies. Koehn and Rosenau (2010: 16) prognosticate that total transnational competence will never be realised: “no one will master all of the skill domains that comprise TC”. As a result, the journey towards TC mastery requires “a heavy dose of humility” (Koehn & Rosenau, 2010: 17).

Some might find it difficult to integrate such soft and, respectively, hard-to-grasp or even lofty-appearing philosophy of a higher personal aim in their attitude towards life in general and TC in particular. They might, rather, prefer hard figures, clear rules to follow or something else to hook their achievements on in at least some way. Koehn and Rosenau (2010: 17) would advise those to cover all five TC domains and fill them with a minimum of two abilities each, as this would “ensure an impressive outcome in each transboundary interaction”. Whether this holds true in practice requires future research. Koehn and Rosenau (2002: 116) warn, however, that “not all transnational actors are equally likely to be effective and successful”.

In sum, TC appears relative because of the vast variety of its individual forms. Put differently, defining transnational competence is relative to individual people and their distinct mix of hard and soft skills. It stands to reason that this mix is composed of different levels of (1) breadth (how many of the five domains are covered), (2) depth (how many abilities in each domain are developed), (3) the kind of compensation (sacrificing breadth for depth or vice versa, such as between generalist and specialist, and/or balancing skill gaps within a domain if possible), (4) mastery (a mind-set committed to lifelong learning and personal growth), and (5) potential (what the individual is capable of accomplishing both physically and mentally).

According to the combination of these factors, which is the individual's transnational competency profile (TCP_i) as well as the collective transnational competency profile (TCP_c), a person or group would move along a competency continuum which Koehn and Rosenau (2002) perceive between ‘incapable’ and ‘proficient’. Whilst the picture of a learning curve appears appropriate, it should, however, be extended to a category that mirrors the notion of life-spanning engagement, proposedly calling it ‘in mastery’.

Where someone is located on the continuum ultimately remains in the eye of the beholder. It might, in the future, be possible to certify the development stages of transnational competence – which, again, is contingent on the eye(s) of the assessor(s) – particularly personal attitudes and assumptions, levels and sources of motivation in addition to perceptions of self and others – seems decisive for starting and moving along the TC learning curve.

4.3.2. Contextual

Embarking on the TC learning curve and remaining on it relies on an environment that facilitates doing so. Thus, TC requires an environment where TC is (1) likely to originate and (2) possible to be practiced. It also needs grounds on which it can arise and grow. This is contingent upon

- (a) *who* is involved (people),
- (b) *what* issue is on the table (problem),
- (c) *where* the issue has happened (place),
- (d) *when* the issue happened (point in time),
- (e) *why* the issue has occurred (cause of problem) and
- (f) *how* the issue can be solved (power resources accessible to the people involved).

Regarding *who* is involved, TC is relative to people and their capabilities. What capabilities people bring with them and develop is, to a considerable extent, determined by their personal histories, commitments, and perceptions of self and others (see chapter 2).

Families moving between places or countries due to the parents' professional duties, for instance, may provide their children with the advantage of becoming transnationally competent. Despite the stress it can cause for children and young adults to be extracted from their circle of friends repeatedly, dealing with isolation, overcoming loneliness through creating new relationships and experiencing diversity are, arguably, core to what contributes to someone becoming a transnationally competent person. Put differently, while children and their parents may lose something in this identity and gain something else.

People who grew up bi- or trilingually – for example, as son or daughter of transnational couples who have moved to yet another country – have clear advantages in terms of TC as well. As Koehn and Rosenau (2010: xx) suggest, "bicultural and multicultural individuals have a head start on transnational competence".

From the IIE (1997: 20), we learn that advanced levels of transnational competence require "a combination of real-life experience and classroom learning". This includes language and cultural training starting in high school complemented with studies and internships abroad plus other international experiences (ibid). Negt (2010: 234 emphasis in original) argues that competence is acquired best through experiencing the tension between theory and praxis ("*Spannung von Theorie und Erfahrung*").

In addition to a favourable private background, a particular professional identity may foster TC. Among seafarers, for example, there appears to exist a unique occupational culture shaped in part by an affection for travelling, love for the endless expanse of the sea and a feeling of being home in more than one port. Especially crucial seems an attitude towards unconditional teamwork as much as a sensitivity and respect for higher natural forces.

Concerning what issue is on the table and why it has arisen, one question is whether the problem at hand either includes a cross-border dimension or if there is potential to build one. Another question is whether the problem is between capital and labour or a labour-internal matter or if it can be transformed to a wider social reach.

In this respect, we may remember the ITF Global Action Day Campaign postulating that 'Fatigue Kills' and to put 'Safety First', described by Urata (2011). This campaign points to the lack of rest which all truck and train drivers around the globe share due to the increased time pressure companies put on their suppliers and supply chains. We may also recall the Colombian union SINTRAEMCALI, which connected its local labour struggles against privatisation of public services to global human rights issues (chapter 2). We may likewise remind ourselves on International Framework Agreements.

All three examples entail a cross-border dimension and share a common global 'enemy', namely capital and its political supporters. Such a context is favourable for TC to originate and to be practised – in a globalised world, every issue is transnational.

TC appears more difficult to grow among the labour movement if national labour representatives engage in transborder 'whipsawing games'. Similarly unfruitful would be the grounds for TC if the initiation and maintenance of EWCs were seen by local representatives as a means to impose their respective local interests. While both situations have a transnational dimension, the 'enemy' is the respective other national labour movement and work place. Whether TC is likely to originate and possible to practice under such destructive win-lose conditions would depend on the level of inter-union rivalry and trust between the representatives.

Developing Transnational Competence depends, moreover, on location. This relates, on the one hand, to where the people the people involved were, are at the moment and will be in the future. It depends on which country or countries are concerned. Different places can provide different as well as similar opportunities and constraints and, in turn, shape the biographies of individuals and groups. These factors may include not just private and professional circumstances, but, rather, economic-financial, political-institutional and socio-cultural structures, locally as much as globally, as well.

Here, we may recall the challenges of workers in the capital core and periphery countries. The relations between labour representatives can be characterised on a spectrum from labour imperialism and cross-border charity to genuine transnational emancipatory support. While both instances would be beneficial for TC to arise, the practice of them would differ in quality. Where human relations are based on self-interest in the former, they originate from solidarity in the latter. Consequently, the duration of TC practice will differ. Human relations based solely on self-interest are, arguably, likely to cease earlier than more constructive human relations based on compassion for both self and others.

Location is, furthermore, decisive for the power resources available to people. The depth and breadth of European legislation is unique in the world. No other trading bloc, like ASEAN, MERSOCUR or NAFTA, is as developed. Therefore, labour in Europe can draw on more enforceable legal underpinnings than other workers of the world. Despite European legislation, however, the differences in national legislation are still substantial. Workers in more coordinated market economies (CMEs) like the Scandinavian countries, Germany, Austria, Belgium, etc. are comparably more protected and supported than workers in the liberal market economies (LMEs), such as Ireland and the UK.

In addition to formal institutions, we may recall more generally human, social-organisational, moral and other cultural resources distinguished by Edwards and McCarthy (2004) in a previous chapter.

All of the abovementioned factors may change over time so that different constellations can occur. As outlined, some constellations are more favourable than others for Transnational Competence to evolve.

4.3.3. *Holistic*

When Koehn and Rosenau (2010: 17) discuss the holistic nature of transnational competence, they emphasise that “the TC-framework is particularly inclusive”. The two scholars justify their statement by referring to the multiplicity of skills, conditions and identities that it covers.

What skills can be learned through TC seems, indeed, quite diverse, as the framework subsumes other concepts, not only of transnational learning but also of adult education in general.

Koehn and Rosenau (2010) argue that Transnational Competence goes beyond the limitations of the two major competitor concepts, namely cultural (CC) and intercultural competence (ICC). On the one hand, they put forward that CC falls short in preparing people to build effective relationships and networks. On the other, the two scholars contend that even ‘culture’ cannot be seen as pure anymore. Instead, “the dynamic interplay with culture of gender, socio-economic status, place of residence, power position, discrimination/persecution, and transborder connections” generate “considerable intergroup variations” (Koehn and Rosenau, 2010: 6).

Thus, both CC and ICC, they argue, are too narrow for today’s open, interconnected and multifaceted world. By holding on to these well-established concepts, people will remain unable to “respond effectively to *whatever* international problems and opportunities may confront them in their later lives” (ibid: 7, emphasis in original).

Additionally, the TC framework appears to incorporate the six competencies which Negt (2010) suggests are crucial for comprehending connections: i.e. identity, technological, justice, ecological, economical and historical. Also, the conceptualisation of transnational competence

proposed by Kehrbaum (2010) can be integrated in Koehn and Rosenau's framework, which is action-related, social, methodological, technical and political skills.

Regarding the multiplicity of conditions, the two authors refer to "population movement, [...], porous boundaries, transdisciplinary connections, fluid multinational corporate loyalties, frequent job transfers, and socio-economic divides" (Koehn and Rosenau 2010: 17). In other words, transnational competence can be both a cause and effect of a wide range of human decisions, such as taking a study semester in Spain, working as an au-pair year in the US, work-and-travel in Australia/New Zealand, moving as an expatriate to Hong Kong, following the job transfer to Singapore or teaching English as a foreign language (TEFL) in Tokyo. People might also live in a multicultural community, have friends from different places, partners from another country or relatives abroad. They might emigrate or seek asylum because of unpleasant economic and/or political conditions at home. In other words, the reasons *why* TC may apply are as infinite as its learning curve.

As to the multiplicity of identities, Koehn and Rosenau (2010) see them particularly in cultural, political and social terms. TC is supposed to be open to all people no matter what ethnic, political or social background they have. Drawing on the Irish Employment Equality Acts of 1998-2010 to cross-check ethnic and social discrimination, transnational competence can be acquired regardless of gender, civil and family status, age, race, religion, sexual orientation or membership of any community.

Furthermore, whether stemming from a LME or CME, a dictatorship or democracy, a capitalist or communist ideology, an open or closed economy, a large or small country, an indebted or unindebted nation, etc., TC appears to be open to personal identities from all types of political economies. The motivation to acquire transnational competence as well as the financial resources and the institutional support can be limited by these factors, though. For example, the more closed a political economy is, the less inclined its people might be to consider TC, except those working in export-oriented industries and companies. The more open a political economy is, the more its people require transnational competence to do business and travel beyond national borders.

Koehn and Rosenau (2010) demonstrate, moreover, that a number of professional identities may be formed by Transnational Competence, such as teachers, Masters of Business Administration (MBAs), engineers, social-justice workers, sustainable development experts and health care professionals. It seems obvious, however, that this small yet diverse selection of professions is more of a first impression than an exclusive list of TC-prone professions. *Who* can acquire and apply transnational competence eventually, then? The TC framework could, arguably, be a pedagogy to almost all human beings, notwithstanding their private and professional preferences.

In sum, Koehn and Rosenau's major emphasis for TC – namely, its particular inclusiveness – appears to deliver what it promises. The framework clearly contains professional, private and social abilities: in other words, both individual and collective capacities. It also integrates other concepts of (trans)national learning. The five sub-competencies appear to complement each other and form a harmonious whole that facilitates the learner's acquiring broad and multifaceted knowledge of the Other. TC is interdisciplinary and TC education can be built in the curricula of various fields of study. Koehn and Rosenau (2002) point out, furthermore, that TC acknowledges that money, power and other resources can inhibit education in and application of the framework. Moreover, indicative for the concept's holistic character is the fact that, as discussed earlier, some deficits in one sub-competence may be rebalanced by proficiencies in others.

4.4. Limitation: Functionalist-Instrumentalist View

Koehn and Rosenau (2010: xxi) propose that TC includes a "humanist promise", but they do not elaborate further on it. Whilst the two scholars, meanwhile, focus on the professional uses of TC, they say a few words on "laypersons" (ibid: xx). They regard laypersons exclusively in their roles as family members, friends, migrants and, not least, information resources for professionals in policy-making positions. In other words, Koehn and Rosenau (2010) reduce people to their alleged duty to act effectively and efficiently in their private social circles, to seeking residence permission in foreign countries, and to other professional-nonprofessional interactions. The authors view TC predominantly as a means "to function well in this world" and to create "a well-functioning society", as suggested by the OECD (2005: 4 and 6). Yet, they seem to miss the second part of the OECD's statement, which addresses the higher purpose of competence: to empower humans in fulfilling their desire "to make sense of [...] this world" (OECD, 2005: 4).

What, in their view, exactly is the humanist promise of Transnational Competence, then? Do they mean that if humans function well transnationally, they are more likely to achieve completion? Otherwise put, if people function well, will they get crowned with success and will this sense of achievement motivate them to continue the journey towards personal fulfilment? However, can one become truly free just by functioning only? Probably not. Koehn and Rosenau's perspective on the purpose of human life as well as the TC framework appears, as a result, somewhat limited in this respect as well. They seem to perceive the possibilities of Transnational Competence in a fairly functionalist way instead of a humanist one. Whilst this view meets the functional purpose of education and the increasing tendency to commodify it, Koehn and Rosenau seem to neglect the normative determination of education (see chapter 2). Koehn and Rosenau's view of TC suggests, in fact, the tension between the mechanistic and holistic paradigms and the ongoing shift from the former to the latter.

4.5. Extension: Transformative Competence, Human Elements and Interconnected Circles

Koehn and Rosenau's considerations of the holistic nature of transnational competence appear incomplete for another reason as well. Not only *what* TC can teach, but *why* it evolves and *who* can learn from and use it are all important to the holistic philosophy as well. Also, *how* this competence can be gained appears an important topic.

As mentioned earlier, the modern conception of competence comprises knowledge, attitudes and skills. Bloom (1956) describes this triangle as made up of cognitive, affective and psychomotoric capacities. This notion mirrors one of the late 16th century, when the Swiss reformist pedagogue Johann Heinrich Pestalozzi introduced the idea of human learning through conscience, emotions and the body: respectively, the head, heart and hand (Brühlmeier, 2010). The OECD (2005: 10) suggests, similarly, that "Individuals encounter the world through cognitive, socio-cultural and physical tools".

The triangle of thinking, feeling and doing – Pestalozzi's '3H-concept' – is unmistakably reflected in the definition of Transnational Competence. The analytic and creative/imaginative abilities may be assigned to the cognitive domain (head), the emotional ability stands for the affective domain (heart), while the communicative and functional abilities represent the psychomotoric domain (hand).

Through addressing head, heart and hand, TC facilitates connected learning, as it involves both halves of the human brain – i.e. the rational/analytical (left) and the intuitive/creative (right) side. It enables, moreover, cross-linked learning since all five main human senses – seeing, tasting, hearing, touching and smelling – may be stimulated.⁴⁵ Likewise conceivable through TC are decisions based on the gut feeling commonly known as 'intuition', often referred to as the sixth sense (Epping, Fischer, Rauch, Wahl, & Wedlich, 2006).

In this way, TC may help the individual to make sense of the world as a whole and oneself as a unique and precious part in it. To the multiplicity of skills, conditions and identities that Koehn and Rosenau (2010) suggested capture the holistic notion of TC might, therefore, be added multiple 'senses'.

In addition to *what*, *why* and *who* transnational competence embraces as well as *how* it is acquired, *where* it is acquired is in line with the holistic outlook since people are encouraged to adopt different international contexts as learning environments. For instance, TC might be developed in various countries and educational institutions with both private and public employers from different industries, sizes and social purposes (e.g., family-run businesses, TNCs, governmental bodies, NGOs, non-for-profit organisations, etc.). People might also pro-

⁴⁵ Rudolf Steiner (1981) enlarged the five classic human senses to a circle of 12, namely the sense of touch, live, movement, balance, smell, taste, sight, warmth, hearing, word, thinking, ego (Tastsinn, Lebenssinn, Bewegungssinn, Gleichgewichtssinn, Geruchssinn, Geschmackssinn, Sehensinn, Wärmesinn, Gehörsinn, Sprachsinn, Denksinn, Ichsinn). The question how many senses humans have can, therefore, not be answered unanimously.

actively seek extracurricular activities that involve interaction with multinational individuals, such as engaging in one or more universities' societies, joining suitable groups on meetup.com, volunteering as reading helpers in primary schools or whatever is available.

What is more, the question of *when* transnational competence can be acquired and applied is, likewise, in accordance with the holistic philosophy. Learning can happen at any time (Negt, 2010). Otherwise put, everyone can acquire and use TC day and night. Especially today, when communication technology makes it possible to be online 24/7, this is important. 'Anytime' also means that it does not matter how old people are or at what stage in life one is.

The holistic nature of transnational competence – marked by the multiplicity of skills, conditions, identities and senses – shall, therefore, be complemented yet again: firstly, through 'spaces' to account for *where* it can be acquired and applied and, secondly, by 'moments' referring to when this can be done.

4.5.1. Spirituality in TC

It has been established that Koehn and Rosenau's TC framework facilitates learning through head, heart and hand. In other words, Transnational Competence can develop cognitive, affective and psychomotoric abilities. Given the holistic nature of TC, one might assume that the framework demands the whole person, as the human mind, heart and body is activated. This triangle of mind, heart and body does not, however, capture all aspects of humanness. A truly holistic picture of humanness, or 'being human', considers four human elements, i.e. mind, heart, body and soul. Wigglesworth (2012a, 2012b) postulates, analogously, four fundamental human intelligences: physical, mental, emotional and spiritual.

As clearly as analytic competence is mind-centred, functional competence relates to the body. Furthermore, emotional competence points to the heart. The communicative and the creative/imaginative TC domains, however, appear less straightforward than the others. In fact, they seem to include a dual centre; that is, they share two elements sharing the core position.

Communicative competence centres on the mind and heart. This may be explained, on the one hand, physically through the location of our vocal apparatus; it is situated between heart and head. More significantly, the throat connects the head with the home of the heart (i.e., the chest). Psychologically, on the other, what humans communicate towards the outside is mostly the result of an inner discussion between the head and heart, or cognition and emotion. Through the senses, we receive information in the form of words, voice, body language and energy. Conditioned by knowledge and previous experience, the brain and intuition interpret new information and produce thoughts and feelings. These thoughts and feelings create our experiences and determine, conversely, our (re)actions, such as what we do or which attitude we adopt.

In terms of creative/imaginative competence, the mind interplays with the soul. In order to be creative, we require the head for thinking about alternative and innovative, yet reasonable, solutions to a challenge. Innovations, however, require thinking outside the conventional boxes or even removing the boxes as such. In addition to mental capacity, creativity presupposes, hence, a feeling of courage to leave one's comfort zone. However, the power which may eventually challenge people to remove boundaries and develop courage is of a spiritual nature. It is, namely, inspiration. It appears, then, that cognition and inspiration fundamentally fuel the creative/imaginative competence domain.

As a result, the current concept of Transnational Competence addresses all four human elements and stimulates all four human intelligences (Table 4-2).

Table 4-2: **Transnational Competence and the Human Elements**

TC	Human Elements
<i>Analytic</i>	Mind
<i>Emotional</i>	Heart
<i>Creative/Imaginative</i>	Mind-Soul
<i>Communicative</i>	Mind-Heart
<i>Functional</i>	Body

Source: own illustration

The balance between these domains (i.e. the amount to which each domain acts as a source for human learning) ultimately depends upon the intensity of the involvement of each in the human experience. In the above table, the mind is core to the three TC sub-competencies whilst body and soul are present in just one each. The soul element is the element least considered, while the heart is present in two TC sub-competencies.

Since the TC framework relates to all four human elements or intelligences, one might agree with Koehn and Rosenau that their concept is, indeed, 'collectively exhaustive', at least for ordinary adult education and, probably, the commitment to international trade unionism that Croucher and Cotton (2009) suggest is needed. For more critical adult education, however, as well as more fundamental structural changes in the economy, society and political governance at all levels, the TC framework is not as collectively exhaustive as Koehn and Rosenau assert. More precisely, TC overlooks the crucial competence to liberate and revolutionise. This is especially true for labour and its representatives whose proclaimed purpose is to emancipate labour from capitalist and political oppression and exploitation.

4.5.2. Transformative Competence

In order to liberate labour from oppression and exploitation, the Dutch social revolutionist and Marxist theorist, Anton Pannekoek (1936), advised before the Second World War that

"workers themselves must change. They have to take a wider view of the world. From their trade, from their work within the factory walls, their mind must widen to encompass society as a whole. Their spirit must rise above the petty things around them".

Freire (2002: 51) pushes this description of the required labour spirit even further. He demands that workers and their representatives "reflect[] and act[] upon the world in order to transform it". In other words, Freire envisions not merely the national society that Pannekoek had in mind but, rather, mankind respective to global society. Lévesque et al. (2013) suggest, likewise, that the labour movement is in urgent need of transformative capabilities. Therefore, TC requires expansion, at least – but not only – for the purpose of trade union education.

The *transformative competence* needed to complete the TC framework is based, too, on a humanist and holistic ideology. With the systemic flaws of capitalism in mind – especially social inequality and ecologic destruction – labour needs the ability to envision an alternative economic-financial system. Such a system would, arguably, be neither the "casino capitalism" (ETUI, 2012: 11) that we face nor a return to the Soviet interpretation of socialism that we know. Rather, the movement requires the ability to envision a new social order completely: "a new conception of man, of life, education, work and civilisation". Remarkably, Gorz (1967: 132) was not blinded by the post-war economic and social prosperity of the Golden Sixties and called for revolutionary thinking in spite of it. In addition to economic-financial and socio-cultural transformations, the movement's vision should focus on political alternatives that reinforce today what labour sought yesterday: radical democracy and social justice.

The transformative ability to envision structural changes does, however, not just apply to governing humanity. The holistic ideology also includes re-envisioning governance and building structures that ensure an alternative treatment of nature. Therefore, alternatives need to be sought which ensure environmental sustainability and the preservation of planet Earth for succeeding generations.

This vision of sustainability should also include consideration for maintaining the well-being of body, mind, heart and soul. This vision for human and environmental sustainability seems essential in order to prevent us, the human race from destroying the habitat we need to survive and 'burning out' our physical, mental, emotional and spiritual beings. We increasingly exploit not only our environments but also ourselves for capitalist purposes. Therefore, transformative competence is needed to bring us (back) on a sustainable track.

The transformative competence would empower not only labour but everyone to create and adapt systems of governance as much as social, economic, political and ecological structures that help 'make the world a better place': systems and structures which support human beings on our way to becoming more human.

The transformative competence would, hence, help to ensure that we do not make ourselves slaves to the systems and structures we create.⁴⁶ On the other hand, it can enable us to self-reflect and scrutinise those conservative and extreme ideologies on which the current, fundamentally flawed economic, political and social systems and structures are based. Instead, transformative competence shall empower us to build practical frameworks that help us to live the happy lives we deserve and to fulfil the mission(s) we are called to fulfil.

In sum, transformative competence may be described as follows:

- Develop wisdom and critical consciousness;
- Live the values of worldwide social democracy, justice, human equity and ecologic sustainability;
- Rekindle the utopian vision of international solidarity and create a higher spirit of transnational unity;
- Advocate more long-term (r)evolution than short-term gains; and
- Liberate both oppressors and oppressed and emancipate them towards humanisation and happiness.

The key words for this competence include *ideology, emancipation, wisdom, vision, spirit* and *(r)evolution*.

Meanwhile, the transformative competence is based on inspiration and, thus, relates to the soul element. Meaningful and constructive as opposed to useless and destructive transformation, however, necessitates compassion towards self and others. The second element which is essential to the transformative competence seems, therefore, of an emotional nature, which points to the heart. As a result, the transformative competence consists of a dual core, like the communicative and the creative/imaginative competence.

By adding the transformative competence, an overall balance between mind and heart in TC is established. The space for both elements is now the same: namely, one full core and two halves that influence three sub-competencies each. The body and soul element are now granted both equal space, too. Where the former takes up one full core, the latter is spread over two core halves. Thus, despite equal space, the intelligence of the soul impacts two sub-competencies whilst the functionality of the body is attached to one.

⁴⁶ This seems nowadays the case, economically, with neoliberal capitalism. Socially, people may prevent themselves from emancipating due to limiting beliefs ingrained in religion and other culturally grown institutions. Politically, it is everything undemocratic, such as regimes based on dictatorship (e.g. North Korea, China) and corruption (e.g. Venezuela, Indonesia).

In contrast to Koehn and Rosenau’s idea of Transnational Competence, this extended framework does not marginalise the soul and the sense of purpose and meaning the soul carries with it. This framework, rather, puts it the soul in a position to balance out the instrumentality of the body. In this way, the scholars’ fairly functionalist view of TC might get the humanistic consideration they claim. Furthermore, the rationality of the mind, in this framework, does not dominate the heart’s urge to emotional freedom. Instead, both dimensions of the self have now have the potential to make decisions. This rebalancing between heart and mind underpins, furthermore, Sayer’s (2011) dualistic notion of ‘emotional reason’ (chapter 2).

4.5.3. Order and Illustration

In addition to expanding the TC framework by adding the transformative competence, it is necessary to change the order of the six sub-competencies along the human body from the top to the bottom of the spine: head (analytic), throat (communicative), heart (emotional) and gut (creative/imaginative). Due to the spiritual aspects of transformation, the transformative competence shall reside, like a crown, as the higher aim/power. Functional competence is the fundament where all competencies come together, and it is, thus, the root of application/psychomotoric action. The consolidated TC framework is presented in Table 4-3:

Table 4-3: **Summary of Transnational Competence (TC) Extended**

Competence	Key Words	Human Element(s)
<i>Transformative</i>	ideology, emancipation, wisdom, vision, spirit, (r)evolution	Heart-Soul
<i>Analytic</i>	understanding, link, discern, assess, learn	Mind
<i>Communicative</i>	language, interpretation, cues, messages, dialogue, misunderstandings	Mind-Heart
<i>Emotional</i>	open, interest, respect, identities, efficacy	Heart
<i>Creative/Imaginative</i>	potential, syntheses, alternatives, inspiration	Mind-Soul
<i>Functional (project/task)</i>	relationships, application, problems, conflicts, strategies, goals, resources	Body

Source: Koehn & Rosenau (2002, 2010); own illustration

Transnational Competence in form of a picture does not, as of yet, exist. The author suggests the following, therefore: given the proposed holistic nature of TC, all sub-competencies have to be portrayed interconnectedly. The way they are arranged shall follow the body composition. Mirroring head, heart and hand, the analytic, emotional and functional

competence are situated in a vertical row from top to bottom. The communicative and creative/imaginative competencies are placed beside emotional competence.

The heart constitutes the centre of the framework, balancing mind and body. Moreover, Pestalozzi postulated centuries ago that morally responsible and compassionate human (inter)action in the service of a higher good or a larger idea presupposes people putting their hearts first (Brühlmeier, 2010). The transformative competence frames the other five in a circle (Figure 4-1).

Figure 4-1: **TC in Portrait**



Source: own illustration

4.6. Transnational Competence for Trade Union Education

Now that the TC framework is established, the question is how it can be applied to trade union education, particularly in view of the goals of enhancing labour's ability to practice teamwork across borders and progressing New Labour Internationalism (NLI). Learning from the factors that may foster and hamper transnational labour collaboration (chapter 2), how the six sub-competencies can be applied to labour activism is described below.

First, workers and their representatives require an attitude geared towards transformation as opposed to conformity. For developing a transformative attitude, people must be in an emotional state that invites change. For the world to change, we start by changing ourselves. The emotional competence includes, hence, an openness to change which affects the TC

learner fundamentally. To move transnational actions beyond 'bread and butter' issues, workers must overcome their fears, leave their individual and collective comfort zones and broaden their horizons. To do so, personal, organisational and structural barriers and dynamics need to be broken, making room for new patterns of thinking, feeling and doing. Since change can happen overnight as much as incrementally, openness to change also implies the flexibility to alter directions and behaviour spontaneously or as planned in accordance with the situation. As we remember, the perception of place is vital for mobilisation, and workers must be able to set it as well as adapt to it.

Welcoming fundamental change also requires curiosity and comfort with everything that is unknown and not obvious. Thus, workers will be able to utilise the patchy and ever-changing field of legislation and develop the cultural hybridity which is necessary for transnational identity. Curiosity and comfort to step into the dark are also essential for creativity, innovation and the willingness to pro-act. To enhance these characteristics, the TC learner must be supported in taking risks and developing the self-confidence to act instead of react. Mobilisation requires the perception of power, as well, through self-efficacy and the assertion of rights. Drawing on the case of SINTRAEMCALI, governments' and employers' offenses to counteract (transnational) mobilisation may include militant action, so that workers are ready for confrontation to have perseverance in fighting labour and related battles: "Freedom is acquired by conquest, not by gift" (Freire, 2002: 47).

In order for cross-border collaboration to improve, workers' must, moreover, commit constructively to transnational labour solidarity as well as to lifelong and lifewide learning. It is evident from the case studies in chapter 2 that actors' mutual learning and de-learning from their own and others' mistakes, their approaches to problem-solving, and their best practices are all important. Constructive commitment and mutual learning in transnational teamwork originates from compassion for self, others and nature. Moreover, compassion is both the basis for transnational personal, collective and social identity building and forming a productive (biophilic) character and the fundament of trust, respect and empathy, which are all necessary for sustainable and effective transborder mobilisation and revolutionary change.

Compassion is also the springboard for transformation towards liberation and humanisation. Liberation from oppression requires liberation without becoming oppressor, so becoming more truly humane is the vocation of humanity (Freire, 1973, 2002). If labour wants to help remove suffering from self and others, increase people's freedom and happiness as well as support the Earth in healing, transformative competence must promote values such as human equity and ecologic sustainability, social democracy and social justice. Values provide meaning for action, and injustice is a central trigger for mobilisation.

In order to arrive at values and actions that underpin human flourishing, workers must develop wisdom and critical consciousness (Freire, 1973, 2002). Such 'wide-awakeness'

(Greene, 1977; Rautins & Ibrahim, 2011) enables us to unveil human realities more profoundly, to detect manipulation better and to build a future where living the above values is not an exception but the rule worldwide. Since workers need to collaborate around the globe with other social movements in order to build NLI and an alternative future, transformative competence must facilitate a rekindling of the utopian vision of international solidarity and create a higher spirit of transnational unity. The perception of unity is fundamental to identity formation. Ideology work and emancipation as much as NLI require time, though. Therefore, transformative competence includes advocating more long-term (r)evolution than short-term gain.

Higher aims beyond 'bread and butter' issues and mechanical solidarity require creativity and imagination. Creative and imaginative competence is, likewise, needed for turning incidents of social dumping and resource exploitation into opportunities for cross-border action. Liberation and humanisation are impossible without "radical and fresh thinking" (Novelli, 2011: 100) as regards innovations and utopias inside and outside the labour movement. Inside labour, workers must be empowered to take advantage of new types and spaces of contestation and allies, organisational structures and strategies, new labour internationalism, etc. Outside labour, TC learners need to be supported in developing a vision for the radical reorganisation of human life, including a new conception of civilisation, education, ecology and work.

As most workers and citizens of the world will meet neither personally in their lives nor electronically through social media and are yet required to feel connected with each other as well as with Mother Earth, creative-imaginative competence must help the TC learner to envisage a borderless 'community of fate'. Abundance and alternatives regarding ideas and solutions and new values and visions for a more biophilic world order can be achieved, but this is a matter of creative and imaginative abilities. Workers must learn how to meet local demands innovatively and solve global issues through win-win solutions. Eventually, "everybody has a creative potential and from the moment [we] can express this creative potential, [we] can start changing the world" (Paolo Coelho).⁴⁷

Connecting local and national events with wider global struggles requires not only creativity and innovation, but also analytic competence. Before workers can recognise how symptoms and root causes, individual and collective concerns and short-term and long-term benefits are interconnected, they must understand the economic, political, social and ecologic fields and their actors in the home country and abroad. Actions that span borders and levels require TC learners to acquire a deep, broad and connected understanding. Knowledge is power, so workers need to understand why they have reached a certain point and how they can move

⁴⁷ <http://paulocoelhoblog.com/?s=creative+potential>, accessed 11 February 2016.

on in pursuit of transformation. Therefore, critical reflection on self, others and context along a certain timeline is key. Considering the past is imperative to analysing the present and setting goals for the future. Transnational solidarity, as one of these goals, refers back to the First Internationale and current identify commonalities between labour in different countries. Awareness of differences is, likewise, a result of analytic competence and may be seen as a source for potential conflict as well as mutual learning.

Analysis, creativity and imagination all require food for thought. The functional competence, therefore, supports workers in learning how to research and exchange information which not only crosses borders but also provides critical and alternative interpretations of the world. Essential for NLI is also the social-organisational resource of networks. The TC learner is, hence, facilitated in building and maintaining relations to different people at different levels and in diverse organisations inside and outside the labour movement. Following social network theory, interpersonal ties can range from weak to strong, where each has advantages and disadvantages (Granovetter, 1973, 1983). A variety of different tie strengths appears, therefore, advisable for progressing workers' cross-order networks. Managing people and their (inter)personal conflicts seems, thus, an important ability which the TC learner can utilise to build networks within and beyond the local union organisation and employer.

Functional competence includes, furthermore, the ability to manage transnational projects successfully, such as protest campaigns, conflict resolution between plants, position statements, EWC building, educational activities, etc. Integral to project management, to trade union education and to TC is the matter of resources. Functional competence improves workers' capacity to access, utilise and improve suitable resources of self and others effectively, efficiently and creatively. Ideally, these resources are distributed evenly between national labour movements and between labour at different levels so that every union organisation can contribute to transnational collaboration equally meaningfully. In order for unions to minimize dependence on external resources, labour-internal resources require full use and development. Material, human, social-organisational, moral and cultural resources may be exchanged for one another to balance the distribution of labour's resources in different countries and at different levels and to increase their availability.

Ultimately, every TC learner is facilitated to lead and act by example; for instance, by initiating and participating in cross-border actions, creating a colourful network of transnationally competent allies, practicing participatory leadership, working on individual and collective identity building, living the transformative values of democracy, social justice, and sustainability, etc.

Interpersonal connections must be maintained through communication. Communicative competence is, likewise, imperative to exchanging information, raising awareness, creating

opportunities and identities, etc. Trust and compassion are key to effective and sustainable human relations. To build trust, communication must be open and honest. Dialogue is important for active learning, critical thinking and dissolving hierarchies. Communication that addresses all the human elements and involves the earlier-mentioned six human senses is, arguably, the most organic and holistic and, hence, the most humane and liberating. Similarly, active listening is an act of compassion and may be empowering, as it not only shows respect and interest in the other but also provides a space for the dialogue partner(s) to be heard. Compassion for self and others is, furthermore, inherent in the ability to negotiate win-win solutions where the gain for everyone is comparably high. Win-lose agreements are as destructive as win-win solutions where the pieces of the cake are shared unequally. Organic transnational solidarity requires constructive collaboration.

So, transnational teamwork requires a language that creates openness, trust, respect and a mood for discovery and sharing. Communicative competence means, therefore, preventing people from closing down and putting up their guardian shields as a result of fear, anxiety or threat. In order to do this with a variety of people and communicate on eye-level with friends and foes and understand their worlds, the TC learner must acquire the vocabulary of different target groups. Company management have their 'business talk' and trade unions talk 'labour', whilst the union constituency is quite diverse. At European level, however, a distinct 'Euro talk' is spoken.

Apart from these professional jargons, transnationally competent workers would speak at least one other national language besides their native tongue. For most workers in Europe, English as a second language would make sense, for English is not only the global language of corporations and science but also the language most recognised internationally. Furthermore, English is, besides French and German, one of the official languages of the European Union. However, individual language requirements also depend on the corporate environment – e.g., in which countries subsidiaries are located as well as the language proficiency of other comrades.

The ability to speak a common language may reduce the barrier to approaching comrades from other countries by phone, email and in person and maintaining contact between personal encounters. Moreover, a shared language among labour would decrease translation costs. As we will see in chapter 6, the ETUI Education department spends about a third of its overall expenses on interpreters and equipment as well as translations.

The following table (4-4) summarises Transnational Competence as a tool to improve cross-border labour collaboration. This table acts as a framework for categorising and assessing trade unions' educational programmes at EU the level (part III), in Germany and in Ireland (part IV). As illustrated in figure 4-1 (above), it becomes evident how interconnected all six transnational competencies are.

Table 4-4: **TC Applied to Master the Challenges of Transnational Labour Collaboration**

Competence	Definition
<i>Transformative</i>	<ul style="list-style-type: none"> • Develop (inner) wisdom and critical consciousness; grow transnational personal, collective and social identity • Live the values of worldwide social democracy, justice, human equity and ecologic sustainability • Rekindle the utopian vision of international solidarity and create a higher spirit of transnational unity • Advocate more long-term (r)evolution than short-term gains • Liberate from both oppressors and oppressed at all levels and emancipate towards humanisation and happiness
<i>Analytic</i>	<ul style="list-style-type: none"> • Understand the economic, political, social and ecologic environment/dynamics and actors' strategy/decision-making in the home country and abroad • Adopt a deep/multi-level (vertical), broad (horizontal) and holistic (connected) perspective along a certain time line (past, present, future), i.e. organic, encompassing and process-oriented thinking • Reflect critically on the behaviour of self, others and the respective contexts (internal/external); realise both commonalities and differences, recognise connections between human behaviour and the outcomes of actions • Build bridges between individual and collective concerns which may be both immediate/short-term and ongoing/long-term; recognise how the four areas may complement and contradict each other; go beyond 'bread and butter' issues and connect local/national events (symptoms) with wider global struggles (root causes)
<i>Communicative</i>	<ul style="list-style-type: none"> • Communicate openly, honestly, dialogically involving all four human elements and all six senses • Listen actively • Negotiate win-win solutions • Speak the language of different target groups at different levels, e.g. Euro talk, business talk, trade union talk, constituency talk, etc. • Be fluent in one or more common national language(s)
<i>Emotional</i>	<ul style="list-style-type: none"> • Open for change: <ul style="list-style-type: none"> ○ fundamentally in overcoming fears, leaving comfort zones and broadening one's horizon, breaking barriers and dynamics (personal, organisational/collective, structural); ○ able to change directions and behaviour spontaneously as much as planned (flexibility) • Curious and comfortable to meet the unpredictable/unknown • Brave to take risks, self-confident to pro-act (can-do-attitude), readiness and perseverance to fight, constructively committed to transnational labour solidarity • Appreciate continuous and mutual learning and de-learning (lernen und entlernen); learn from both own and others' mistakes, strengths, weaknesses, approaches to problem-solving, best practices, etc. • Be compassionate to self, others and nature; respect and empathise with others in terms of their history, current circumstances and future plans (personally [privately/professionally], organisationally/collectively, structurally)

***Creative/
Imaginative***

- Radically innovative and utopian/boundless thinking:
 - inside labour in terms of allies, target constituency, contestation types and spaces, union types and strategies, reorganisation of labour, new labour internationalism (NLI), etc.;
 - outside labour envision a new conception of man, life, education, work, civilisation and ecology
- Imagine a cross-border/regional/global community of labour, human societies as well as Mother Earth and all her other inhabitants, a 'community of fate'
- Come up with abundant ideas and alternative solutions that allow favourable circumstances for all living beings: meet local demands and solve global issues through win-win solutions

Functional

- Research on relevant issues comprehensively, including critical and alternative suggestions, and exchange information frequently
- Build and maintain collaborative cross-border networks, vertically to different people at different levels (local to global) and horizontally inside and outside the labour movement: create ties with different strengths from weak to strong
- Manage conflicts, people and transnational projects successfully
- Access, utilise and improve suitable resources of self and others effectively, efficiently and creatively, particularly labour-internal; create a cross-border balance of resources
- Lead/act by example

Source: own illustration

Conclusion

Transnational Competence (TC) was introduced as an innovative concept by Koehn and Rosenau (2002, 2010), and it appears a promising educational framework for encouraging labour to interact constructively across borders. For labour representatives in particular, it might be the key to transnational solidarity. Characterised as *relative*, *contextual* and *holistic*, the TC framework seems not merely valuable for the limited area of trade union education, but for the entire field of human education as well.

However, the TC concept has been constrained by a predominantly business-inspired, functional-instrumental purpose. For liberating TC from this limited view, the author proposes pushing the framework towards its humanist promise and holistic nature.

This push includes, firstly, adding to the five sub-competencies proposed by Koehn and Rosenau – i.e. *analytic*, *emotional*, *creative/imaginative*, *communicative* and *functional* – a sixth: *transformative* competence. Considering labour's roots in and traditions of critically analysing the present and initiating emancipatory debates about utopian alternatives in the world of work and human society (see chapter 2), this transformative competence is, arguably, the most important to enable workers and their representatives as well as global citizens to fundamentally change themselves, their environments and their governing structures.

Secondly, by extending TC through the addition of transformative competence, we reduce the imbalance between the four human elements, or intelligences: *mind*, *heart*, *body* and *soul*.

Koehn and Rosenau respect each of them to differing degrees. As portrayed in table 4-3, the mind represents analytic competence and is needed, partly, for creativity/imagination and communication. The heart, meanwhile, is included in emotional competence and is also core to communication. Functional competence mirrors the body element. The soul has a place only in terms of imagination and, therefore, shares creative competence with the mind. As such, the mind component of TC features in three competencies, the heart in two, the body in one and the soul is marginalised to a co-assessor of the mind.

The transformative competence introduces additional space for the heart and soul. As a result, this TC extended framework provides equal space for the heart and mind. A balance between heart and mind is vital for labour to act with 'emotional reason', with both a 'sense of love' and a 'sense of duty', with the 'sword of justice' and with 'vested interest' (see chapter 2 and 5). If the mind is stronger than the heart – which has been the case among labour for a long time – workers and their representatives will be inclined to put self-interest first and forget the ideological reasons for working together across borders. Likewise, if the mind is considered equal to the heart, (trade union) education would emphasize its functional and normative purposes. As addressed in chapter 2, the normative side of trade union education is key to improving meaningful and sustainable transnational labour action because solidarity and mobilisation spring from the heart and soul as opposed to the mind. Therefore, if in conflict, the heart should be favoured over the mind.

In addition to balancing heart and mind, the introduction of the transformative competence equalises the body and soul. Allowing more space for the spirit makes functioning meaningful (again). As shown in chapter 1, the cultural crisis of labour is deep, culture has a spiritual dimension (Tisdell & Tolliver, 2001; Tisdell, 2008), and spirituality is essential for transformative learning (see also chapter 2). Thus, in order to revitalise labour as a movement and enhance cross-border collaboration, spirituality must be given a distinct space in trade union education. Through the 'concrete utopia' (Bürgin, 2014 referring to Ernst Bloch) of international solidarity, for instance, labour might engage in transnational action for higher purposes than self-interested survival.

To increase the holistic character and humanist promise that Koehn and Rosenau attach to TC, these sub-competencies have been reorganised along the composition of the human body from the top to the bottom of the spine: transformative (crown), analytic (head), communicative (throat), emotional (heart), gut (creative/imaginative) and functional (root). Also innovative is the illustration of TC in interconnected circles.

In sum, the concept of Transnational Competence is valuable for analysing trade union education for several reasons. Due to its origin in business and political science, trade unions can learn from their opponents (corporations and neoliberal governments). Business and politics face the same challenges which arise through global interaction. By adding the

transformative competence, labour would be one step ahead in improving transnational collaboration both within the movement and outside, in view of a more peaceful, environmentally-friendly and humane world, work and life.

TC is, moreover, suitable for analysing trade union education because the framework covers the concept of education, which comprises knowledge, attitudes and skills. Strikingly, attitudes, as represented by emotional competence, are an integral part of international business and political sciences.⁴⁸ Labour scholars highlight, likewise, the importance of emotions (Kelly, 1999) and utopias (Bürgin, 2014; Gorz, 1967) for mobilisation (of the heart and soul). Arguably, a feeling of mass connectedness can make labour strong; the vision and values of justice, peace and freedom for all human beings can make labour move. Therefore, trade unions must embrace emotions and spirituality in their educational programmes, too.

Now that the theory of trade union education and Transnational Competence as a special educational tool has been fully established, the following chapter provides details on the research design. The research methodology, methods and case selection provide a solid bridge to the subsequent, empirical part of the study.

⁴⁸ In fact, not only emotions have become recognised in organisational development and management training (for an overview see Ashkanasy et al., 2009), but also spirituality (Harlos, 2000). The idea of 'transformational leadership' has been around since 1978 (Bass, 1999).

5. Chapter: Research Design

“Problems and problem-solving are the core of social science research” (Vennesson, 2008: 239). The problem which this thesis attempts to help solve is the matter of joint transnational labour action. The research has suggested that cross-border collaboration between national labour movements can be enhanced through tailored educational activities. In turn, improved labour collaboration across borders appears to promise to strengthen labour from the local to the global level. Therefore, trade union education may contribute significantly to labour revitalisation. Revitalised labour is assumed to help prevent workers’ rights as well as citizens’ social security nets in Europe and around the world from being deconstructed and ‘improved’ neoliberally, in favour of labour’s economic freedom.

5.1. Research Problem

The labour movement in Europe is in crisis. Workers’ interests have lost attention vis á vis capital, nationally as much as internationally. Individual exploitation, social inequality and a lack of participatory decision-making are likely to increase as a consequence. A majority of national centre-right governments, in addition to neo-liberally inspired supranational governments in Europe, contribute to this development by creating a business-friendly institutional setting. In addition, traditionally labour-attached centre-left national governments may not always keep to their traditions. Through Agenda 2010, for instance, the previous social-democratic chancellor, Gerhard Schröder, buttressed deregulation and commodification in Germany. Arguably, wherever trade unions have lost political support or have never had it substantially, labour is required, more than ever, to regain its own organisational power.

Labour renewal is a significant in the academic literature (Frege & Kelly, 2004), and is regarded as a matter of urgency (Turner, 2004). Cross-border collaboration is one strategy for strengthening the representation of workers’ interests. So far, however, the number and impact of transnational actions in Europe has been fairly limited. Neither have transnational representative bodies, like EWCs, been able to make a difference.

Besides structural constraints and organisational flaws that can hamper transnational trade union action (see chapter 2), workers and their representatives lack the appropriate knowledge, attitudes and skills for meaningful transborder teamwork. Hence, labour renewal can be enhanced through labour education (Bridgford & Stirling, 2000b). This idea appears lacking among the research, though. Discussion of the merits of and the potential for trade union education in revitalising the movement is also missing (Miller & Stirling, 1998; Novelli & Ferus-Comelo, 2010; Stirling, 2007). Likewise neglected is discussion of trade union education in debates about “adult learning, labour relations or, [more broadly speaking], the role of unions in society” (Spencer, 2002: 11).

Generally, the field of trade union education seems somewhat unattractive to scholars, as research on trade union education has remained sparse and “barely visible within the voluminous literature centred on labour organizations” (Ball, 2003; Forrester, 2010: 139; Spencer, 2002a). This is true not only regionally in Europe (Bridgford & Stirling, 2000b), but also around the world (Croucher & Cotton, 2009). Yet, there are several cases in which educational activities have been noted as an instrumental for outcomes favourable to labour (see e.g. Croucher, 2004; Erne, 2008; Novelli, 2011; Whittall, 2000; Wong, 2002). It appears, therefore, appropriate to say that “trade union education awaits a major study” (Croke & Devine, 2007: 5).

Meanwhile, labour representatives do not appear persuaded that education can help them renew the movement, treating adult education more “as an adjunct of change, not its motor” (Stirling, 2007: 208). Whether this perception is a cause or effect of the lack of research is an open question. What appears clear, however, is that those labour representatives who acknowledge the power of education also appear to consider other things more important. Investing time and money into trade union education seems a low priority. Thus, workers and their representatives underestimate the potential of education tailored to help them overcome their current and future challenges.

In sum, “never was it more important for unions to establish their legitimacy and their own distinctive education programmes” (Spencer, 2007: 15) than it is now, and research is required that helps labour in so doing. Trade union education is an area which only a small group of researchers has entered whilst the majority of labour appear to disregard it altogether. As a result, trade union education is side-lined in both theory and practice. This lack of knowledge and experience opens up, conversely, the potential for innovative contributions in academia as well as the labour movement.

5.2. Research Purpose

This thesis aims at advancing the hitherto largely unrecognised area of trade union education in both theory and praxis by placing it at the centre of the labour renewal debate. Since transnational labour collaboration is not only a promising but also inevitable strategy for renewing the movement and helping it to become a serious ‘countervailing power’ (Galbraith, 1980) to globalised capital, this project discusses the role and impact that labour educational activities can have on improving cross-border collaboration. In so doing, the thesis helps to close two research gaps which Pulignano, Martínez Lucio and Walker (2013) have identified. They found that the existing literature neither explains sufficiently how cross-border union collaboration can be sustained in the long run nor examines sufficiently how learning can facilitate this. More generally, , by selecting trade unions in Europe as research subjects, the author of this study aims to contribute to the social future of the continent.

5.3. Research Question(s)

Given the abovementioned circumstances of labour, the research question that guides this project is as follow: *'To what extent does trade union education in Ireland, Germany and at the EU level foster labour representatives' transnational competencies, and what are major challenges to achieving that?'*

In order to answer this question, it has to be decomposed into several sub-questions. These sub-questions relate to the sub-areas which the overarching research question touches upon. The first area is trade union education. We need to know what trade union education is, what its purposes are, which pedagogical approaches are best applied in trade union education and which approaches are best for enhancing transnational trade union collaboration (chapter 3).

To limit the scope of this research project, trade union education was investigated in the particular geographical area of Europe. In order to take account of the multi-level governance structure of Europe, trade union education is assessed supranationally as well as nationally. Exemplary for the national level are two different countries, Ireland and Germany. At both levels, the following queries require clarification: How has trade union education evolved? Who are the actors in the field? How are they connected with each other? What are the actors' mission and vision? What educational activities do they offer and where, particularly for enhancing cross-border labour collaboration? What pedagogy is put into practice? What and how many resources (human, technical, time, money) do the actors invest in trade union education? What are the challenges the actors face?

The third sub-area regards transnational trade union collaboration. This field is investigated with a view towards enhancing the practice of trade union collaboration. But why does cross-border collaboration have to be enhanced at all? Arguably, there is always room to improve anything, and the room for improving labour's transnational teamwork is particularly large. Stevis and Boswell (2008: 107) describe labour internationalism as "a slow process, with periods of slow change interrupted by windows of opportunity", and this is hardly a compliment to labour, especially given Turner's simultaneous observation that the movement's renewal is urgent. So this study has address what factors may foster or hamper transnational trade union collaboration (chapter 2)?

Finally, if trade union education is supposed to enhance cross-border labour collaboration, then education providers need to equip workers and their representatives with appropriate tool kits. This thesis has suggested that Transnational Competence (TC) is the appropriate tool kit. Hence, this research has addressed what TC is, as introduced by Koehn and Rosenau (2002, 2010), the concept's origin, its contents and characteristics, its similarities with and differences from competing concepts, its shortcomings to date and how can these shortcomings may be overcome (chapter 4).

5.4. Research Philosophy

The thesis shall be based on a holistic, integrated and systemic way of thinking. Holism (from the Greek 'holos') is commonly captured by the phrase 'the whole is greater than the sum of its parts'. The term was coined by Jan Christian Smuts (1870-1950) who, in his book *Holism and Evolution* (1926), argues that the world is not made up of "stuff" but of "arrangements" (quoted in Savory & Butterfield, 1999: 19). Correspondingly, Savory and Butterfield (1999: 19) note that "individual parts do not exist in nature, only wholes, and these form and shape each other. [...] Isolate any part, and neither what you have taken nor what you have left behind remains what it was when all was one". In other words, parts can neither exist in solitude nor be understood without their connection to the larger whole. Every part of nature is mutually related to another. Moreover, every part carries the information of the whole (Emoto, 2001). Thus, what we see on a large scale will show up on a smaller scale, and vice versa.

This thesis embraces this theory of universal interconnectedness by following Pietschmann's (2009) motto of 'distinguishing without separating'. In other words, implicit in this research project is the acknowledgement that we cannot grasp the world in separated pieces but only as an entire system. Therefore, an attempt is made to understand 'individual parts' as much as their roles in the broader context of the whole. Every part is seen as a reflection of the whole. Moreover, fundamental to the project's holistic view is the acknowledgment that all living parts in this system are not merely matter, but interacting energy fields; that the immaterial has more impact on human beings than material possessions; and that spirituality and science are not as opposed to each other.⁴⁹

Hence, holism, in this thesis, means considering the balance of the four human elements of body, mind, heart and soul. Incorporating this spiritual view will address the recent claim of one IR icon, Richard Hyman, in his keynote speech at the ILERA 2014 in Dublin, that "we need a more human discourse of what our challenges are". Spiritual considerations are, moreover, appropriate for this project as one of the trade union movement's fundamental ideological pillars – solidarity – implies these characteristics. Since the spirit of solidarity appears weak among labour, the movement may require a 'spirituality boost'. Allowing space for spirituality also provides groundwork for the normative dimension necessary for this research, capturing trade union education as a potentially emancipatory force.

Conversely, since workers' emancipation processes are embedded in a larger, multi-layered context, a holistic analytical perspective is essential to capturing these processes that result from human action at different levels (see chapter 2 and the distinction between structures, organisations and individuals made there) as well as from different perspectives.

⁴⁹ "Where spirituality denotes values and subjectivism, Western science is based on neutrality and objectivism. Thus, Western science has traditionally discouraged links with spirituality" (Harlos, 2000: 616).

Thus, holism is vital for portraying what role trade union education might play in the (potential) processes of workers' liberation from capitalist oppression and in making more humane not just the world of work but of humanity.

5.5. Research Methodology

Since trade union education is an underresearched field and Transnational Competence (TC) (Koehn and Rosenau, 2002, 2010) an emerging concept, this project aims at shedding light on two fairly unknown terrains. The thesis, therefore, is more exploratory than explanatory in nature. Nonetheless, applying a holistic lens, the methodology aspires to be both theory-building/elaborating (inductive) and theory-testing (deductive). Adopting this double strategy is, according to Héritier (2008), a form of 'abduction'. For example, based on desk research, chapter 2 conceptualises the main factors that may foster or hamper cross-border labour collaboration. Chapter 4 introduces Transnational Competence as a concept. Whilst the existing TC framework appears valuable for this research, however, it is incomplete. Therefore, the expanded version of TC provided in the previous chapter will act as the basis for coding the empirical findings in part III and IV.

For providing a broad overview of TC education among labour, it is important to understand how the various actors in the field interpret the complex and continuously changing context in which they surround themselves. Inspecting multiple realities created through different meanings and motivations are, thus, also important to this study. This stance is typical for qualitative research.

Once the realities are established, it is important to know why they differ. Therefore, we need to visit the quantitative domain and understand the causes and effects that build the context. We assume that certain factors (x_i) have a central influence on a particular outcome (y). (x_i) and are the potential reasons, or so-called independent or explanatory variables, that may lead to a particular result (y), named the dependent or response variable. Chapter 2, for instance, outlined the factors that can foster or hamper transnational trade union collaboration and attempted to find connections between them. Evidence is, however, not presented quantitatively, in numbers, but qualitatively, in what Geertz (1973) calls 'thick description'. This is because the purpose of the project is not to find out to what extent variables correlate, but what their characteristics, patterns and combinations are. Applying both causal and interpretative analysis is, however, not contradictory (Ragin, 1987a).

As a result, in line with a holistic approach, the aim of this research project is at either a 'x-centred' or 'y-centred' design (Gschwend & Schimmelfennig, 2007) but, rather, at an 'x- as well as 'y-centred' one. Factors that shape actors' decisions should receive as much attention as the decisions as such. Therefore, both external and internal explanations are required –

i.e., the extrinsic causes for actions as well as people's intrinsic motivations for taking them (Della Porta, 2008).

To achieve all this, a qualitative research design is more suitable than a quantitative one (Marshall & Rossmann, 2006). Qualitative research "allows, even encourages, exploration, discovery and creativity (ibid: 138). Moreover, the factors or variables that may be tested quantitatively first have to be uncovered through qualitative inquiry.

Typical for qualitative research and suitable for a holistic approach, the methodology used here is driven by a case study instead of by experiments. As Ragin (1987b: 49) notes, cases are "examined as a whole, as a total situation resulting from a combination of conditions, and cases are compared with each other as wholes". Cases are not viewed as "collections of variables, [... but] the different parts or conditions that make up a case are understood in relation to each other" (ibid: 52).

Case-driven research appears especially appropriate for this project since Croucher and Cotton (2009) insist that the field of labour education requires more of it. As opposed to variable-driven research and its strive for generalisability through a large and representative number of observations, case-driven research attempts to explain particularities through a small number of observations (Della Porta, 2008). Depending upon the selection of observations, however, case studies may arrive at general findings. They do so if the cases are representative of the category they are taken from. Ultimately, both general and particular research results are legitimate (Della Porta & Keating, 2008), as are case studies for testing and illustrating theory (Roche, 1997). Furthermore, case studies allow flexibility in data collection since qualitative and quantitative methods are both possible (Venesson, 2008). Given this, case studies are especially useful for discovering and describing social mechanisms (Della Porta, 2008; H ritier, 2008).

Due to the project's descriptive-interpretative nature, the matter of 'control' must be solved differently in comparison to natural scientific experiments. Control, in scientific studies, is paramount in order to minimise measurement errors whilst maximising the validity and reliability of research results.⁵⁰ In the social sciences, it is impossible to manipulate explanatory variables to the same extent as in the natural sciences, however, because the objects of study are different. Where the social scientists address the whole and living human being, natural scientist analyse extracts from humans, dead materials or other beings in nature whose intelligence is supposed to be lesser than that of the human race. (Unfortunately, some natural scientists experiment with whole and living animals.) Thus, whilst human beings may escape scientific control through lies, bias and other forms of unauthenticities and inaccuracies that

⁵⁰ Validity means that "the measurements reflect what the investigator is trying to measure". Reliability is guaranteed if "different measurements of the same phenomenon yield the same results" (King, Keohane, & Verba, 1994: 151).

are 'human', less intelligent beings, substances and materials cannot thwart research designs to such a substantial extent.

Control, in small-N case studies, can be introduced by comparisons, for example, through what is called Qualitative Comparative Analysis (QCA) (Della Porta, 2008). Comparative research facilitates highlighting similarities and differences that have developed in a common context. The comparisons, in this project, are made vertically between the national and supranational level as well as horizontally between a number of national trade unions from different countries in Europe. Particular attention is given to Ireland and Germany, but the common context is the European Union.

The focus of this analysis is on labour. The level of analysis is threefold. At the micro level, the individual labour representative is in view. The meso level can be divided between smaller and bigger collective representation bodies: European Works Councils and local trade unions. The macro level concerns structures in which individual and collective labour representation actors create and embed themselves. Hence, variables are investigated which are of an individual, organisational and systemic nature.

As a result, this PhD project may be termed a 'collective and multi-site case study' (Creswell, 2007). It takes a multilevel, cross-national comparative view. The comparison is three-dimensional: one dimension compares the biggest trade unions in two nation states. Another dimension compares two different sectors in these countries: the private and public sectors of the service and manufacturing industries. The third dimension compares the national level with the supranational level. Deciding in favour of a multi- instead of a bi-level perspective better accounts for a holistic approach. Whilst bi-level comparisons can be made between two countries, the mutual connection between the bigger whole (Europe) and the smaller wholes (member states) can be constructed as. In this way, complex social processes can be mapped out more realistically. Seemingly, there is also a need for more cross-country, comparative studies in the trade union world (ETUI, 2013c).

Multiple in this study is not only the case selection but also the review of literature. This research project borrows from various disciplines in the social sciences. The underlying literature is, therefore, not limited to education and industrial relations, but it draws on international relations, organisational management, social psychology and philosophy as well. The thesis uses, hence, an interdisciplinary approach.

5.6. Case Selection

Selecting appropriate case(s) is always a challenge in a qualitative inquiry (Creswell, 2007). The challenge is to justify why, especially, a given case is suitable for answering the research question. If opting for more than one case, as this study does, the question becomes one of how many cases are appropriate. Given the shortage of time and human resources, this project

is restricted to the three special spheres of the EU as a whole, Germany and Ireland. Another issue concerns the kinds of cases that should be considered: different, similar, ordinary, accessible, unusual (ibid), the most typical, the most telling (Della Porta, 2008), anything else?

Ireland and Germany are different in many ways, yet similar in some. Where Ireland is a small island with a population of around 4.5 million, Germany is a large continental nation of roughly 82 million inhabitants. Despite this difference in size, both countries are open economies that share a focus on international economic relations. This is important because labour is more likely to collaborate across borders when the national economic strategy builds on transnational flows of capital, goods, services and people, as Frege and Kelly (2004) put forward.

The countries' economic strategies are, however, contrary. After China and the US, Germany currently ranks third in global export power and, thus, directs its attention to outward capital flows. Ireland, in contrast, is most engaged in attracting inward foreign direct investment (FDI) from around the globe. US American multinationals have taken advantage of access to the European market at one of the world's lowest corporate tax rates of 12.5%. As a result, Germany has many home-grown firms and is unique for its (yet slowly dying) 'Mittelstand', whereas Ireland relies more on large, foreign-owned multinationals.

Secondly, both countries are located in opposite corners of the *Varieties of Capitalism* (VoC) map that Hall and Soskice (2001) have started painting and that Crouch (2005) has critically reviewed in terms of allowing for more deviation from the two ideal types. Whilst Ireland represents a rather liberal market economy (LME) in theory, it may, in practice, be "neither Boston nor Berlin" (Allen, 2003), yet possibly "a lot closer to Boston than Berlin" (Ireland's former Enterprise Minister Mary Harney in 2000 quoted in White, 2011). Berlin, representing Germany, is still far more coordinated (CME) than an LME like the United States, even as institutional changes have pushed 'Modell Deutschland' towards more Boston-like deregulation and commodification (Erne, 2008; Hall & Thelen, 2008; Streeck, 2009). Nonetheless, it seems fair to say that Ireland can represent LMEs whilst Germany can represent CMEs.

This conceptualisation corresponds to the *Three Worlds of Welfare Capitalism* by Esping-Andersen (1990, 1999), in which Germany is marked as the prototype of the corporatist-conservative category.⁵¹ As in the VoC, Ireland is in the liberal cluster, with the US as its archetype (Arts & Gelissen, 2002). Esping-Andersen (1999) notes that demographic and institutional changes originating from Europeanisation and globalisation can challenge traditional welfare arrangements. Thus, newer accounts distinguish five welfare worlds (Arts

⁵¹ Italy, Japan, France, Finland and Switzerland are viewed as other corporatist-conservative countries, whilst Austria, Belgium, the Netherlands, Denmark and Norway would join Sweden in the social-democratic cluster (Arts & Gelissen, 2002). De Beer et al. (2001) found, however, that the Netherlands imply a hybrid position between the corporatist-conservative and social-democratic model.

& Gelissen, 2002; de Beer, Vrooman, & Schut, 2001). The categorisations of Germany and Ireland have, however, not changed.

These fundamental institutional differences are reflected in the types of industrial relation regimes in each country. Larsson (2014) considers Visser's typology the most elaborated. Based on Esping-Anderson's welfare models, amongst others, Visser proposed that there are five different regime types among EU member states: i.e., 'organised corporatism' in the North, 'social partnership' in central Europe, 'state-centred' in the South, 'liberal' on the isles and 'mixed or transitional' in the East, except Slovenia (European Commission, 2009, 2013). Whereas Germany is assigned to the social partnership category, Ireland is, as before, classified as liberal. It follows that both countries have a tradition of IR, but that their key indicators, such as collective bargaining coverage, union density, workplace representation and company board structure, vary notably. Their employers' association densities are, interestingly, the same (ibid).

Based on these different models of capitalism, Ireland and Germany have different strategies for competing in the global market. As opposed to competition based on quality among CMEs, LMEs pursue a national competitive strategy on the basis of costs. Thus, the Irish economy is based mostly on short-term horizons and shareholder profit maximisation where the incentive to invest in common goods is low. The German economy is structured more around long-term stakeholder relations, such as those between banks and companies as well as industry and schools/universities. As a result, Ireland has driven down the low-wage, low-productivity route, ending in a low-skills equilibrium (McLaughlin, 2013). Germany, in contrast, is committed to a high-skill, high-wage, high-productivity road, at least in the unionised, export-oriented manufacturing industries.

Noteworthy is that the Irish minimum wage is 15 Eurocents higher than that of Germany. However, even if the national minimum wages are similar, purchasing power and the quality of products is considerably higher in Germany than in Ireland. Then again, the Hartz reforms and the introduction of mini-jobs have enlarged the German low-wage sector substantially. Both examples used the coordinated elements in the liberal model of capitalism.

Another fundamental institutional difference between Germany and Ireland regards the matter of union identity. As discussed in chapter 3, Hyman (2001) has proposed that there is an 'eternal triangle' between market, class and society. He locates Germany between society and market and Ireland between market and class. As a consequence, trade unions' educational programmes in both countries can be expected to have commonalities and differences.

Table 5-1 summarises the fundamental institutional differences on the systemic (macro) level.

Table 5-1: **Institutional Differences between Ireland and Germany**

<i>A Case of...</i>	Ireland	Germany
<i>Location in the Political economy of the Eurozone</i>	Periphery	Centre
<i>Model of Capitalism</i>	Liberal	Coordinated
<i>World of Welfare Capitalism</i>	Liberal	Corporatist-conservative
<i>IR Regime</i>	Liberal	Social partnership
<i>Union Identity</i>	Between market and class	Between society and market
<i>Approach to Education</i>	Short-term, low-skill	Long-term, high-skill

Source: own illustration

Given these systemic national differences, both Ireland and Germany are likely to have dissimilar ideologies on the provision of public goods, such as education and training. Therefore, variations regarding trade union education may occur in key areas like access, funding, participation and content (Bridgford and Stirling, 2000). Taking into account the results of chapter 3 and anticipating the empirical evidence of chapters 8 and 9, table 5-2 expands on the sub-macro indicators which may potentially explain the differences in trade union education and resources available in Ireland and Germany, respectively:

Table 5-2: **Ireland and Germany: Differences in Trade Union Education Key Indicators**

	Republic of Ireland	Germany
<i>Pedagogy</i>	Constructivist	Critical-emancipatory
<i>Main Level of Educational Focus</i>	Local	Local to national
<i>Funding of Trade Union Education</i>	State: SOLAS (previously FÁS), Dept. of Enterprise, Trade & Employment Employers: Skillnets	State: Federal/Länder government Employers: necessary training for labour reps, Supervisory Board members' salary which TUs divert to the Hans-Böckler-Foundation and themselves
<i>Ratification of ILO Convention 140 (1976, Paid Educational Leave)</i>	No	Yes, translated into the Bildungsurlaubsgesetz (BiUrlG). 2 Länder have not transposed it, 2 did just in March 2015.
<i>Other Legal Sources</i>	Code of Practice in Industrial Relations Act 1990	Works Constitution Act (BetrVG) Federal Law on staff committees in the public sector (BPersVG)
<i>Number of TU Confederation Members, i.e. Potential Participants*</i>	ICTU: 778.316 (2013)	DGB: 6,104.851 (2014)
<i>Number of Active EWCs**</i>	7	253

Source: own illustration, *= ICTU (2013); statista.de, ** = ETUI EWC database, August 2015

Chapter 8 and 9 suggest that trade union education in Germany and Ireland will follow different pedagogical approaches. This is important because workers and their representatives can, in turn, be expected to be equipped with different knowledge, attitudes and skills. These differences can act as hurdles to collaboration. However, pedagogical approaches can also differ between trade unions within a country. Therefore, this thesis investigates the educational programmes of the national union confederations in addition to those of the biggest sectoral affiliates.

The empirical chapters will show, furthermore, that trade union education in both countries focuses on the local level, which means preparing labour representatives for their roles in the firm. This suggests that there will be a market orientation in German and in Irish trade union education. However, in addition to local issues, German trade unions emphasize national social concerns in their programmes, which underpins their position on the 'Hyman triangle' towards society. Therefore, German trade unions appear closer to offering transnational trade union education than Irish.

Resources are also key to trade union education, especially financial and institutional ones. Given the fundamental institutional differences outlined above, German and Irish trade unions can be assumed to differ in their quality, quantity and access to external resources. Most obvious is the fact that Germany provides legislation for paid educational leave whilst Ireland does not (see chapter 8 and 9).

Trade unions' educational activities may also differ due to dissimilarities in the target group. Germany is almost 18 times larger in population (82.5 million) than Ireland (4.6 million).⁵² Therefore, the sizes of their trade unions differ, and their numbers of potential participants. The larger the number of participants, the more various is the educational demand. The more various the educational demand, the more likely there will be variety in trade union education programmes.

Finally, a decisive factor for differences in transnational trade union education seems to be the number of European Works Councils. EWCs are cross-border representative bodies by nature whose members require transnational education for fulfilling their roles. In October 2014, the ETUI counted 1061 EWCs.⁵³ Nearly a fourth of them are headquartered in Germany, whilst Ireland hosts roughly 0.7%. Even taking the size of Ireland and its trade unions into account, this number is insignificant. However, some Irish trade union representatives are in British EWCs – exactly 145 (13.7%).

These institutional and organisational differences have remained, despite the fact that both Ireland and Germany are members of both the European Union (EU) and the European Monetary Union (EMU). EU membership allows certain national authority, for instance in social

⁵² <http://www.worldometers.info/world-population/population-by-country/>, accessed 25 August 2015.

⁵³ <http://www.worker-participation.eu/European-Works-Councils>, accessed 25 August 2015.

policy. Country-specific institutional differences and similarities can, hence, be maintained to some extent. At the same time, as noted earlier, institutional changes have been going on because both countries are member of the EU and EMU. Thus, the European integration process exerts converging power onto EU members. This pressure to converge provides both an incentive and necessity – a carrot as well as a stick – for trade unions in Europe to increase their collaboration across borders. Many fundamental flaws notwithstanding, no other trading bloc in the world is as advanced as the EU in growing carrots and producing sticks.

The incentive is provided for by a supranational legal framework that seeks to develop 'Social Europe'. Workers and citizens are granted fundamental social rights, including freedom of association and the right to strike. Trade unions are recognised as social partners at the European level and could, therefore, negotiate collective agreements besides the opinion statements they mostly have been issuing. Workers have the right to be informed and consulted about company decisions; they also have the right to involve themselves in transnational corporate decision-making through Special Negotiating Bodies (SNBs), European Works Councils (EWCs) and board-level representation in European Companies (SEs). Moreover, there are numerous European health and safety regulations supposed to ensure humanly appropriate working conditions, although these are still fairly limited to the physical body. Gender equality is one of the EU's objectives.

The necessity for trade unions to collaborate across Europe is underscored by the four freedoms (goods, services, capital, labour) which are the backbone of the European Single Market (ESM). These freedoms are more beneficial to capital than to labour, however, since the latter is less mobile and financially weaker than the former. At the same time, the four freedoms are used often to challenge workers' and citizens' social security nets. The vital task for European trade unions is, hence, to maintain and improve labour and social security regulations and to ensure that economic freedom remains within the firm boundaries of Social Europe. Due to their comparable weaknesses vis á vis capital, this task can only be met if workers and their representatives collaborate across national borders and ally with global social movements.

In addition to the transnational legal framework of Europe, trade unions on the continent themselves have established transnational structures which do not exist in other trading blocs but that can be valuable for coordinating transnational teamwork and education. The labour movement in Europe was founded in 1973 as an umbrella organisation which includes, today, 85 national trade union confederations in 36 countries as well as 10 European Trade Union Federations (ETUFs). Thus, the European Trade Union Confederation (ETUC) claims to be the voice of over 60 million workers.

Attached to the ETUC is the European Trade Union Institute (ETUI), and both based are in the International Trade Union House (ITUH) in the centre of Brussels. Financed substantially

through the European Commission, the Institute provides research and training for the European labour movement. The ETUI is, hence, assumed to be the continent's exemplary service provider for facilitating transnational labour collaboration through cross-border trade union education. Choosing the ETUI as a case of trade union education at EU level can be seen as choosing a so-called 'critical' or 'crucial' case. As such, results from the ETUI are assumed to represent all other labour education providers at the European level. In other words, although offering just a single observation, critical case studies such as this are supposed to allow for generalisation (Flyvbjerg, 2006; Marshall & Rossmann, 2006).

As noted earlier, the case selection is based on a three-dimensional comparison of different nation states (Germany and Ireland) and different sectors with different transnational orientations (service and manufacturing) as well as different structural levels (EU and EU member states). Since the array of distinctions between Ireland and Germany is larger than their range of similarities, comparing these two countries can be considered using a 'most different' case design. As opposed to a most-similar case design, a most-different case study can go beyond middle-range theories towards more generalisability. Generalisability, however, does not go as far as to arrive at globally valid theories (Della Porta, 2008). Results are, rather, generalisable only in a certain context (Ragin, 1987a).

'Most different' and 'most similar' case designs originate from John Stuart Mill's attempt to integrate the deterministic logic of the natural sciences into the alleged 'fluffy' narratives of the social sciences. "Mill's method of *difference* assumes that when two or more cases have different values on a certain phenomenon, we have to look for the one circumstance on which they differ", as Della Porta (2008: 204) describes. Whilst not impossible, this assumption appears quite difficult to apply in case studies since a social phenomenon may be the result of multiple causes instead of just one. Mill's assumption mirrors a mechanistic 'either-or' mind-set that strives for simplification and 'one-size-fits-all' results. Nature, by contrast, is often too complex to be understood through reductionist thinking, and causes and effects are not always linear and straightforward.

Mill's method of difference seems, therefore, to require redefinition along more holistic and, hence, realistic lines. Through a mind-set of 'as well as', it becomes possible to explain an effect through more than one cause. It must be considered, moreover, that causes can be related to each other and become effects. The effect is likely to impact back on the cause. As a result, causes and effects, in social sciences, are often interrelated and, therefore, depicted in networked rather than linear relationships.

Since institutional and financial support appears more favourable to trade unions and their educational activities in Germany than in Ireland, we might expect that trade union education in Germany is more developed in transnational respects than in Ireland. As we will see, this is only true to some extent, but both countries share the same problem: namely, that their cross-

border labour collaboration and education remains underdeveloped. Therefore, other causes than differences in national institutional settings, like VoC type and IR system, must be at work that can explain the differences among the commonalities across countries and sectors. A most-different case design makes it possible to identify the root cause for this commonality, since it rules out the differences as explanatory variables and allows us to search further for the one or more decisive variables. The thesis will underscore limitations in both the German and Irish trade union education programmes in terms of developing transnational competence.

5.7. Research Methods

Research methods are the tools with which data is collected. Typical for qualitative research and required for a case-driven design is gathering data through multiple independent tools (Creswell, 2007). This is also called 'method triangulation'. Using a variety of data measures facilitates, on the one hand, a more complex and colourful account of social relationships, patterns of interaction and the meanings that actors attach to them (Marshall & Rossmann, 2006). In short, multiple data measures allow for rich description. On the other hand, triangulation can increase the reliability and validity of research results through cross-checking data (Jick, 1979). Because this project is of a somewhat exploratory nature, access to many actors and events was essential.

The main sources of data in qualitative research are interviews, observations, documents and audio-visual materials (Creswell, 2007). Whereas the first two are primary data sources, the latter two are secondary. Primary resources are compiled by the researcher, whilst secondary resources stem from other people. All four types of information are used in this study. In addition, the survey method, borrowed from quantitative methodologies, which constitutes a primary resource here.

5.7.1. Data Collection

Accounting for triangulation, the qualitative and quantitative data were gathered through secondary and primary research. The interdisciplinary literature on adult and trade union education as well as transnational trade union collaboration was critically reviewed and complemented by research on social movements. A variety of journal articles, books and book chapters, newspapers and magazines, reports, online articles, websites and videos comprised the sources of secondary knowledge. Field work was conducted in Belgium, Ireland and Germany. Empirical evidence was gathered from numerous sources in an effort to map multiple perspectives. On the one hand, people in different organisations and in different organisational hierarchies and departments were contacted. On the other, non-participant observations, interviews with labour representatives and trainers, and two surveys were conducted.

5.7.1.1. Non-participant Observations

Non-participant observation is an important method in qualitative investigation because it allows the researcher to observe, from an outsider's perspective, others people's body language and emotions in addition to and in combination with their words (Marshall & Rossmann, 2006). Due to the distance they provide from the research subject, non-participant observations, by contrast, are particularly suitable for collecting more objective information on conscious and unconscious human behaviour. However, facial and other physical expressions can be a source of misinterpretation, too, since they may have different meanings in different cultures and social milieus (Kehrbaum & Zitzelsberger, 2011). For example, shaking the head in Germany means 'no' or a pondering 'hm', whereas Indian people express their consent in this way. Moreover, one's degree of objectivity may be limited through the one's selective view according to one's subjective preferences and abilities. To minimise observation errors, it may be useful to triangulate with more observers – as is often the case in job interviews and assessment centres – and/or predetermine particular aspects on which to focus observations (ibid). At the same time, any such predeterminations could narrow the observer's view.

As part of the research period at the ETUI between September 2013 and February 2014, I observed 3 internal ETUI Education Department meetings, 2 Pedagogical Committee meetings, 1 ETUI Education Day/Conference, 1 ETUC annual EWC Conference, 1 EWC training, 2 monthly meetings of the European Economic and one Social Committee (EESC). For every observation, hand-written field notes were taken and occasionally accompanied by self-memos. The observations in Ireland and Germany included visits to trade unions' premises and educational centres. Participant observations also included participation in several conferences in the field, mostly of an academic nature (see list of field work and research stays and observations in the appendix).

5.7.1.2. Expert Interviews

Interviews are probably the most prominent research method for use in a qualitative inquiry. People with practical experience relevant to answering the questions of this research project were those who worked in the field of trade union education and those who made use of the services provided. In other words, the target group of interviewees consisted, on the one hand, of Education Officers/Trainers, Administrators and Managers who work for organisations in Europe that offer and/or demand educational activities for labour representatives. On the other, it included labour representatives who have attended or who want to attend educational activities, especially those activities designed to improve cross-border labour collaboration.

At the ETUI in Brussels, I interviewed 17 people: 7 from ETUI Education, 2 from ETUI Research (EWC), 2 from EPSU, 1 from ETF, 1 from ICTU, 1 from the Swedish union Unionen, 1 German EWC member, 1 Swedish EWC member and the British EWC chair. In Germany, I

consulted 11 people: 1 from DGB, 5 from DGB Bildungswerk BUND, 3 from Verdi and 2 from IG Metall. In Ireland, I spoke to 10 people: 1 from ICTU, 1 from IMPACT, 1 from UNITE, 2 from Mandate, 2 from TEEU, 2 from SIPTU and 1 from IDEAS. In addition 12, interviews were held with various experts. The full list of 47 informants can be found in the appendix.

The interviews were mostly in-depth and face-to-face, whilst some were short chats and by telephone and email. Thus, some were formal and semi-structured while others were less structured and more informal. The participants' answers were taken either by handwriting or were delivered electronically. In the case of hand-writing, self-memos were occasionally added. The interviews took between 0.5 and 2 hours.

The interviewees' statements are paraphrased as (name, interview/email, date). The paraphrased statements portray the informants' position as opposed to the author's opinion.

5.7.1.3. Questionnaires

This study included two questionnaires. The first was compiled as part of the ETUI Education Day/Conference from 20 to 22 November in Madrid. The questionnaire formed a non-representative survey that was conducted under the supervision of the ETUI Education Director. Its main purpose was to find out how ETUI Education activities can better meet the needs of their service users at the predominantly national level – i.e., the labour representatives taking the courses as well as the ETUC member organisations by which they are sent.

Responses were requested to a total of 41 questions, 12 of which were open, 3 closed, 14 multiple choice and 12 ranking scales. In case a question did not apply or could not be answered at the moment, a note was added to write n/a = 'not applicable'. The survey was issued in the three conference languages. The author (re)formulated the questions in English. Based on this, external translators provided French and Spanish translations.

The questionnaire was available in two forms: online and on paper. The online version was available from 13 November to 6 December 2013, roughly 3.5 weeks around the event date. During the conference, the author approached as many participants as possible to distribute the paper version to those who had not participated by that time. Two reminder emails were distributed, one shortly before and one after the event. During this communication process, the Education Director's Assistant kept the participants' email addresses undisclosed.

According to the list that the author was given by the Education Director's Assistant, the survey was sent by email to 76 selected conference participants on 13 November 2013. Of 42 total survey responses, 3 came back on paper. The author added these manually to the online survey. Finally, the author manually integrated the French and Spanish online versions into the English one. The online platform was Google Drive. The paper version was prepared through Microsoft Word 2010.

The second questionnaire was issued as part of the Beckers EWC training activity which the author observed from 9 to 11 December 2013. The main purpose of it was to find out how the course participants considered their educational experience.

Responses had to be given to 23 questions: 12 open, 3 closed, 6 multiple choice and 2 ranking scales. Six of the eight participants answered the Google Drive online document between five to seven weeks after the activity. The participants came from France (3), the UK (1), Sweden (1) and Germany (1). A French and a Polish member did not respond, despite two reminder emails. Follow-up emails were sent if further clarification on answers seemed necessary. More details on the methodology, sample characteristics and limitations can be found in the appendix.

5.7.1.4. Documents

Documents include “any material that provides information on a given social phenomenon and which exists independently of the researcher’s actions” (Corbetta, 2003: 287). They can portray social processes well as they provide information on the past, present and future. Documents are also useful for tracking meaning because they can make explicit and implicit the values and beliefs that actors have given to a particular topic or situation (Marshall & Rossmann, 2006). Furthermore, this dead material does not interact with the researcher as opposed to the interviewees. In other words, documents are ‘non-reactive’ (Corbetta, 2003).

The fact that subjective interpretation is involved might be put forward as a disadvantage of documents, especially by those who advocate for total objectivity or total subjectivity. Moreover, documents are but one account of reality. In addition, they are biased by the issuing author or institution/organisation and are often intended to address a particular group or society (ibid). This incompleteness and alleged flaw offers, however, a strength, since documents allow triangulated critical discussion in view of alternative data sources.

According to Corbetta (2003), there are two types of documents: personal and institutional. Some are publicly available whilst some are not. Some come in audio-visional form or soft copy, whereas others are on paper in hard copy. A list of archives, libraries and databases that provided access to the documents used in this research is enclosed in the appendix.

5.7.2. Data Analysis

Data analysis is the effort to make sense of the data collected; in short, to transform data into findings. The data in this project is more textual than numerical, as it stems mostly from documents, notes from interviews and observations and responses to open survey questions. Therefore, the focus is on qualitative data analysis where recurrent themes, social relationships and patterns are discovered (Schutt, 2012).

The challenge in this type of research is to undergo a constant loop of reading, actively listening and reflecting in order to find meaningful concepts, reveal their interconnections and contradictions and explain the results they have caused and can possibly cause in the future. This abstraction of the data is used to capture the context of trade union education, cross-border labour collaboration and individual and collective thoughts, opinions, assumptions, feelings and actions on them. Thus, knowledge is constructed through both visible and invisible information. Quantitative analysis comes up occasionally in the form of figures and numeric tables which are then interpreted qualitatively.

No sophisticated tools like Alceste, Atlas, SPSS or other popular software for data analysis were utilised. The thesis has no intention to develop new instruments for analysing data.

In order to arrive at concepts, data were analysed in terms of their content. Content analysis is "a research method for systemically analysing and making inferences from recorded human communication, including books, articles, poems, constitutions, speeches and songs" (Schutt, 2012: 414). Thus, as Marshall and Rossmann (2006: 108) put it, content analysis is a "method for describing and interpreting the artefacts of a society or group". All three scholars agree that the strength of content analysis is its 'unobtrusive' and 'non-reactive' nature. A researcher does not interfere in the production of artefacts and can determine the angle(s) from where they are examined. For those scholars who consider subjectivity a weakness, content analysis is considered contaminated through the researcher's interpretations and can, hence, not lead to valid or reliable results.

The basic purpose of content analysis is to reduce text into codes which then fit into a concept or theme box (Sonpar & Golden-Biddle, 2007). For example, the concept of Transnational Competence (TC) as introduced by Koehn and Rosenau (2002, 2010) and extended by the author was chosen as a coding plan for analysing the ETUI EWC Learning Pathway. The six sub-competencies of TC resemble theme boxes. The author identified words or phrases in the pathways and reflected on where these data correspond best to one or more of the six TC sub-competencies. Different researchers might arrive at slightly different results (reliability).

To serve as a basis for comparative analysis, tables and charts were created in Microsoft Excel. For revealing interconnections and contradictions among the data, QCA was applied, although I have chosen not to use formal QCA-tables in this presentation. Qualitative Comparative Analysis is an invention by Charles (Ragin, 1987b) who encourages to investigate multiple cases and try to find out what combination of variables/factors in each case produces a certain outcome. As opposed to mechanistically separating variables and reducing them to their presence or absence, QCA looks more holistically at how variables interact and appreciates their complexity. Therefore, QCA research has the "capacity to go beyond descriptive statistical measures, towards an in-depth understanding of historical processes and

individual motivations” (Della Porta, 2008: 202). Following Creswell (2007), suitable for multiple case studies is describing each of the three cases in detail (within-case analysis), before it is analysed what themes occur across cases (cross-case analysis) and what meanings and lessons can be derived thereof.

In sum, this thesis aims to answer its research questions by mapping out and comparing the transnational trade union education activities of the ETUI, the German and Irish trade union confederations as well as selected national sectoral affiliates.

PART II – ANALYTICAL FRAMEWORK

Conclusion

Part II has provided an analytical framework that enables us to distinguish different types of trade union education. Education has increasingly been marketised, which contradicts its continuing promotion as a fundamental human right in Europe and the world. Inherent in these two aspects are the two purposes of education, namely *functional* and *normative*. Different philosophical frameworks of education – *liberal*, *behaviourism*, *progressivism*, *humanism*, and *radical* – consider the functional and normative purpose of education to different extents and in different ways. Trade union education originates from the latter three educational philosophies, whereas only the radical framework is suitable for bringing about transformative changes.

On this background, trade unions can build different forms of trade union education which translate into their course programme and pedagogical approach. In terms of the latter, critical-emancipatory pedagogy which stems from the radical educational philosophy is advocated as the only appropriate pedagogy for improving transnational collective action.

Corresponding to the different educational philosophies and forms of trade union education, different types of educators can form people in different ways. It was argued that the *democratic educator* is much more suitable than the *banking educator* for providing critical-emancipatory trade union education and facilitating participants to becoming *Transformers*.

Subsequently, part II has suggested the concept of Transnational Competence (TC) as a promising educational framework for upskilling labour in cross-border teamwork. Since the original framework inspired by international business and political science appeared insufficient for creating transformative change, to the five competencies was added a sixth called *transformative*.

With the analytical framework of part II in mind, we can explore the field of trade union education in praxis. Therefore, the two following parts analyse the forms of trade union education which can be found at European level as well as in Germany and Ireland, and assess the extent to which the respective unions and related organisations develop transnational competencies. The cases were selected on the basis of a 'most different' research design which applies a cross-national comparative, multi-level and multi-sectoral view (chapter 5).

PART III – TRADE UNION EDUCATION AT EUROPEAN LEVEL

The overarching question which drives this research project is 'to what extent does trade union education in Ireland, Germany and at EU level foster labour representatives' transnational competencies, and what are major challenges to achieving that?' In this part, we look at how trade union education at EU level develops Transnational Competence (chapter 4).

Exemplary for trade union education at European level is the Education department of the European Trade Union Institute (ETUI) for two reasons. On the one hand, the Institute is attached to the official voice of European workers, i.e. the European Trade Union Confederation (ETUC). On the other, the ETUI is politically recognised through sponsorship by the European Commission. Thus, the chapter inquires the extent to which trade union education made by the ETUI facilitates labour representatives' transnational competencies.

In order to answer the query, the author spent 6 months as an intern (stagiaire) at the ETUI in Brussels under the supervision of the current Education Director, Ulisses Garrido. The data gathered through non-participant observations, expert interviews, two non-representative surveys as well as numerous documents give insights into the policies and practices of labour education provided by the ETUI. One particular document that serves as a basis for analysis is the ETUI 2014/15 course programme.

The amount of field data is so extensive that part III is divided into two sub-chapters. The first sub-chapter (6) attempts to uncover the factors which may foster and hamper the ETUI Education department's contribution to enhancing transnational labour collaboration. The analytical framework of part II enables us to classify and assess the ETUI's approach to trade union education in general and Transnational Competence (chapter 4) in particular.

Firstly, we assess the ETUI's *course programme* and *planning* including the selection of venues and future educational activities. The Education department offers a wide range of courses and collaborates with the national union confederations in order to spread the educational locations throughout the continent. The challenges to transnational trade union education appear in the areas of *people* (union leadership, participants and competitors), *pedagogical approach* and *resources*. We analyse the latter in relation to human (ETUI Education staff), material (finance) and socio-organisational resources (partners, advisors, networks, networking events). Conflicts and inappropriate choices in any of these fields may hamper the ETUI Education department's efforts to 'support, strengthen and stimulate' the European labour movement in that they can delay or prevent constructive actions. The selection of factors complies with what Bridgford and Stirling (2000: 7) propose as key areas of European trade union education, namely "access, funding, participation, the role of the national trade union organisations, content and pedagogy and the European dimension".

The second chapter (7) in this part attends to two particular areas, namely ETUI education

1. for European labour representatives that are active in European trade union structures, such as the European Trade Union Confederation (ETUC), European Trade Union Federations (ETUFs), European Committees and Agencies;
2. for members of European Works Councils (EWCs), European Company Representative Bodies (SERBs) and Special Negotiating Bodies (SNBs).

As we will see, the ETUI's educational activities for ETUFs and EWCs differ quite considerably, even if the ETUI recently introduced a structured learning pathway in both education areas. The pathways' ability to foster transnational competencies is mixed. On a positive note, both learning pathways touch upon all six competencies which form the concept of Transnational Competence (chapter 4). However, some competencies are more addressed than others. Despite some flaws, analytic, communicative and functional competence appear covered most. Creativity and imagination seem to fall too short in reach and depth, whilst emotional abilities sound too weak in creating the power, passion and empathy needed for cross-border solidarity actions. Least nurtured appears transformative competence.

6. Chapter: Trade Union Education made by the ETUI

The European Trade Union Institute is the extended, yet independent arm of the European Trade Union Confederation in terms of labour research and education. Whilst the ETUC was founded in 1973, their members acknowledged the need for labour education at supranational level apparently only 17 years later: the then European Trade Union College (ETUCO) was established just in 1990. Under the chair of its founder Jeff Bridgford, the ETUCO merged with the European Trade Union Technical Bureau for Health and Safety (TUTB) in April 2005. Together, these two units formed what is known as the ETUI today.

Through this amalgamation, the ETUCO became the ETUI Education department and lost its independence. What the Department has maintained, though, is its function as probably the leading service provider of trade union education at European level. As Liz Rees, the National Education and Training Manager of the UK underpins, the ETUI is "the key trainer among Europe", "the pre-eminent body" (quoted from her presentation on 20 February 2014). Demaître (2014), one of the ETUI's Education officers, describes his employer as "the reference organisation for trade union inspired training for European-level worker representatives". Why is this? On the one hand, the ETUI is linked directly to the ETUC as the European voice of workers. On the other, the ETUI is politically recognised by the European Commission through funding. Garrido adds that, concerning trade union topics, EU topics, and workers' topics with a European dimension, the ETUI "is really the main provider. On quantity, of participants, of training hours and on quality" (2015, email).

The ETUI's overall mission is to "support, strengthen and stimulate" the European labour movement (ETUI, 2013b: 5) and with it the social dimension of the EU. For so doing, the Education department aims, on the one hand, at developing a European trade union identity. This identity shall reflect the European Union's motto 'united in diversity'. It shall rest on an open mind, mutually respectful treatment as well as a sense for learning, sharing and building solidarity (Demaître, 2013c). On the other, the department promotes education as a strategic tool which is inevitable for trade unions to achieve their goals from local to supranational level (Demaître, 2013c; ETUI, 2013b). We may thus notice that the Education department's mission addresses both labour ideology and interests. Expressed through Sayer (2011), ETUI Education's mission includes a sense of love and duty.

6.1. Course Programme

Since the 2014/15 term, all educational activities follow a new education structure which the Education department worked out together with national delegates from ETUC member organisations as well as the Pedagogical Committee. At its core, there are 9 subject areas addressing trade union 'strategy and priorities' (ETUI, 2014b: 11):

- *Strengthen the European Social Model*
- *Equality and Social Cohesion*
- *Sustainable development and Industrial policy*
- *Worker Mobility*
- *Trade union and leadership renewal*
- *Conditions and work quality*
- *Project Management and Financing*
- *Languages and Communication*
- *Eurotrainers*

A tenth subject area that has been given an education system in its own right is called Worker Participation and relates to EWCs. (More details on this will be provided in the following chapter 7). Additionally, there are so-called 'multi-themes' which include *Improve the Work of Trade Unions in Europe*, *Training Young Trade Union Leaders* and a new specialisation in *High Level Training for Experienced Leaders*. Finally, there are *Various* themes.

The 10 subject areas are distributed mainly through the Department's five core areas. According to the Education Director, these are:

1. Young Trade Union Leaders/Trade Union Youth,
2. Project Management & Financing,
3. EWCs & SE representative bodies,
4. Pedagogy & Eurotrainers
5. Language & Communication.

The areas' ranking reflects their respective share in the 2014/15 budget from high to low. In other words, the Department spends most resources on educating the young cadre (roughly €660,000) while least is used for Languages and Communication (about €150,000). Empowering members of European Works Councils and Employee Boards as well as representatives in European Companies is allocated almost €400,000.

In addition to the core areas, the Education officers offer thematic training. This means providing input on specific topics which have either been planned upfront or are demanded by the trade union organisations rather shortly on a case-by-case basis. The latter is however quite rare. Only 1% of the budget would make up such 'emergency actions', the Director unveiled in a monthly Department meeting. Nevertheless, the minimum timeline between letter of invitation to participants and date of actual activity is 3 months. The topics may concern social dialogue and collective bargaining, recruiting and organising, trade union renewal and mobilisation, youth unemployment, austerity, green economy, nanotechnology, gender equality, labour mobility, or populism and extremism, to name but a few (Demaître, 2013c; ETUI, 2013d).

Table 6-1 gives an overview of the number of education days, the maximal number of participants and the target audience for each of the 10 subject areas.

Table 6-1: Course programme 2014/15: Overview of ETUI Education subject areas ordered according to maximal residential learning space for participants (excluding ETUI networks' meetings)

Subject Area	No. of Education Days	No. of Max Participants	Target Audience
<i>Worker Participation</i>	12 + probably 2 (plus ca. 55* in tailored EWC/SERB/SNB trainings)	118 (plus ca. 650* in tailored EWC/SERB/SNB trainings)	ETUC, ETUFs and their affiliates, EWC coordinators and members from the ETF network, (New) EWC/SERB/SNB members
<i>Languages & Communication</i>	18 (+ 360 online)	68 (+ various online)	TU officers (intermediate English/French), EWC members and coordinators
<i>Project Management & Financing</i>	23	158	Affiliates to EFBWW and EFFAT, Young TU leaders, ECTUN network members, TU officers, ETUC staff, IRTUCs, EURES Cross Border Partners, National confederations and ETUFs
<i>Equality & Social Cohesion</i>	27	144	National and European TU officers, Health & Safety officials, young TU officers (up to age 40)
<i>Trade Union & Leadership Renewal incl. Training</i>	18	115	Affiliates of UNI Europa/DGB/TUC, TU officers, national TU trainers,

<i>Young Trade Union Leaders</i>			National confederations and ETUFs
<i>Eurotrainers</i>	22	111	(National) TU trainers, TU officers, Eurotrainer course participants, E-portfolio builders, ETUI network members
<i>Employment & Working Conditions</i>	13	99	Affiliates of EPSU and EUROCCOP, TU officers, ETUC Youth, National confederations and ETUFs
<i>Sustainable Development & Industrial Policy</i>	12	78	(Young) TU officers, industrial delegates and affiliates
<i>Strengthen the European Social Model</i>	7	63	UNI Europa and ETUC affiliates, national TU officers, TU trainers
<i>Worker Mobility</i>	-	-	-
TOTAL	154 (+ ca. 55) = 209	954 (+ ca. 650) = 1604	

Source: ETUI Education Course Programme 2014/15 (ETUI, 2014b), *Demaître (2013a); own illustration

ETUI Education services focus on cross-border issues. Therefore, the Department aims at integrating a European dimension into their educational activities. This applies particularly to the course content, composition of participants and trainer team(s) (ETUI, 2013b, 2013d). Each residential activity hosts between around 10 to maximal 25 learners from different EU member states or other countries in Europe (ETUI, 2014c). Two or three working languages are therefore usually determined, i.e. those languages for which translation is provided during the activity as well as for the education materials (ibid). In this way, the ETUI course programme seems to foster transnational trade union action.

Moreover beneficial for cross-border collaboration appears that the vast majority of participation places and education days is spent on EWC/SERB/SNB training. Arguably, these bodies as well as their worldwide expansions are the epitome of cross-border labour representation an action. Following the trend of 2012 and 2013, probably around 650 EWC/SERB/SNB representatives receive company-specific training annually on at least 55 education days (Demaître, 2013b). Exact numbers on EWC/SERB/SNB participation do not exist, however, for three reasons:⁵⁴ firstly, the Commission does not require these figures. Secondly, the ETUI software does not allow to produce these numbers. Thirdly, participant lists are not cross-checked pro-actively by neither the Education officer nor the respective administrator (Demaître, 2014, email). The latter is most likely a matter of a constraint in resources, as is illustrated later on.

⁵⁴ On average, Demaître (2014, email) counts 20 participants per training: "there are of course some doubles in that, as some companies came back several times for a training. But even then, there are always new members even in returning EWCs". In both 2012 and 2013, 32 trainings took place. Between 2007 and 2012, the number of EWC/SERB/SNB trainings had been rising steadily (Demaître, 2013b).

Additionally paramount for transnational teamwork is the matter of languages. ETUI Education offers language/communication courses in English and French. One English course is online and open for all trade unionists. Learners can improve from lower to upper intermediate in two levels, whereas one level needs 6 months. Residential language training in English and French takes 5 days each and requires intermediate abilities. Finally, EWC members and coordinators can avail of a 5-day English course tailored to their needs.

The number of educational activities amounts to more than 50 every year, that is on average one per week (Demaître, 2013c). The 2014/15 course programme counts 54 activities in addition to company-specific EWC/SERB/SNB trainings as well as the ETUI networks' meetings. Residential activities take between 1 and 6 days, with an average of 3 days. EWC trainings are on average 2 days (Demaître, 2013b). The blended course of residential and distance learning for young trade union leaders spans over a 10-month period.

6.2. Course Planning

The educational activities are supposed to complement those at national level (ETUI, 2013d). This assumption is reflected, for instance, in the language courses, since labour representatives must have had language training before in order to participate at intermediate level. For aligning ETUI educational activities with the national course programmes, topics are selected not solely by the Education Director and his team. Quite the opposite, the Department's course programme is the result of a three-way consultative process. Top-down, it shall comply with ETUC policies and priorities, the suggestions of the ETUI Advisory Group as well as the approval of the ETUI Director. Peer advice and approval stems from the Pedagogical Committee (PedCom). Bottom-up, the programme shall meet the needs of the respective labour organisations and the delegates they send. Last but not least, the number and kind of activities is subject to the Department's yearly budget. As affiliated yet independent arm of the ETUC, the Education department may wish to achieve own goals too. Meeting all these requirements in course planning appears quite a challenge for the Education Director.

Following Bridgford & Stirling (2000), ETUI Education is thus indeed both driven by policies and led by demand. The Education Director however wished that the Pedagogical Committee would more actively engage in working out the ETUI education strategy. So far, the strategy is not really the result of a democratic-participatory process. Rather, it is "done by me, the new boy on the block", Garrido described at the PedCom meeting in February 2014.

6.2.1. Selection of Venues

The European dimension in ETUI's educational activities is likewise visible through the selection of host countries. In addition to Belgium, the locations for educational activities in 2014/15 are Austria, Belgium, Bulgaria, Croatia, Cyprus, Finland, France, Germany, Hungary, Ireland, Italy, Latvia, Lithuania, Poland, Portugal, Slovenia, Spain, UK. The amount of time spent in these EU member states is, however, quite unequal. Excluding EWC/SERB/SNB training, ETUI's network meetings (12 days) and English online, a total of 152 (plus probably 2) education days are planned. Thereof, 29 are scheduled in Belgium whereas only 2 take place in Ireland and Portugal, respectively. In between, 12 days are anticipated in Italy, Austria and France each. Seven plus probably 2 days shall be hosted in Germany. The imbalance in education distribution outside the ETUI home country emerges, too, if we look into the venues from an IR regime perspective. Most time is spent in the Centre-West (50 days), South (37 days) and Centre-East (33 days). Least visited are the Isles (10 days) and the Nordic countries (3 days). The distribution may, however, change throughout the year since the venue for 21 education days is yet to be confirmed (see ETUI, 2014b) (Table 6-2).

Table 6-2: **Distribution of ETUI Educational Venues in 2014/15**

Country	IR Regime						Total
	Centre-East	Centre-West	North	South	Isles	Tbc	
Bulgaria	3						
Croatia	3						
Hungary	3						
Latvia	5						
Lithuania	3						
Poland	8						
Slovenia	8						
Austria		12					
Belgium		29					
Germany		7 (+2?)					
Finland			3				
France				12			
Italy				12			
Portugal				2			
Spain				11			
Cyprus					3		
Ireland					2		
UK					5		
Tbc						21	
Total	33	50	3	37	10	21	154

Source: ETUI (2014b); own illustration; Tbc = to be confirmed

The variety in host countries across the continent is surely a favourable factor for transnational trade union action, because the participants are encouraged to cross borders. However, the Nordic countries as well as the Isles are not visited much. Moreover, the selection of 18 countries is just about half of all 37 ETUC member countries.

The selection of venues is influenced by several factors. Although the ETUI aims to collaborate with all ETUC affiliates, not all of them wish to be in partnership (Garrido, 2015, email). The explanations seem of a structural nature. One reason may be that their own educational system is well developed, so that no need for partnership is perceived (ibid). Another reason concerns the time frame for programme planning and validity (ibid). For instance, the yearly ETUI programme starts in April, whereas Verdi's educational year commences in September (Michelbrink, 2015, interview). Sometimes, national organisations lack flexibility in aligning to the ETUI's budget year (Garrido, 2015, email). Another possibility is that the potential partners of the ETUI, which are the national confederations only, are not strongly involved in education, as opposed to their sectoral affiliates (ibid). Thus, the national confederations can prevent the ETUI from collaborating with the national level. In some countries, the prices for using Union facilities are higher, so that they cannot be used as often as trade union centres in other countries (ibid). Trade unions in other countries also may not have the appropriate capacity for becoming a partner of the ETUI (ibid). Less interest in the European dimension, which the ETUI stands for, may also be a reason why national organisations do not wish to collaborate (ibid).

Furthermore, collaboration between the ETUI and national trade unions becomes more complicated if additional actors are involved (ibid). A partnership agreement with the ETUI usually includes two national partners, one of which hosts the activity (ibid). Norway and Iceland are ETUC members, but they "are not covered by our possible activities under the EU rules" (ibid).

From the above list, the main reason why collaboration with the remaining Nordic countries is the least of all partners seems, on the one hand, a matter of resources. The ETUI cannot always afford the higher prices in Scandinavia. On the other, the Nordic trade unions are in continuous collaboration regarding trade union education and have well developed systems themselves. "They are better on this [i.e. collaborating across borders]", Garrido (2015, email) admits. Representatives from the Nordic unions put forward, in addition, the issue of location, restructuring, responsibilities and contents of the ETUI course programme. A detailed answer can be found in the appendix.

6.2.2. Future Educational Activities

More individuality and more customisation to service users' needs appears also necessary in terms of course content. Regarding future topics/activities, the 42 survey respondents came up with between 43 and 50 different suggestions. It follows that, on average, every respondent and every trade union perceives itself to have different education requirements in the future. Conversely, the amount they have in common seems comparably small. The topic which the survey participants shared the most in personal and organisational respects was providing and managing trade union education. Since the Madrid event focused on this field, this result does actually not surprise. What surprises more is the diversity and, at the same time, the commonness of individual and collective needs within this education field.

Personally, officials from Romania (CNSLR-FRATIA), Portugal (UGT-P) and Spain (CCOO) wished that the ETUI Education department would do more to share best practices, methodologies and tools in the future. Participants from Germany (DGB), Italy (CGIL) and Spain (CCOO) would appreciate train the trainer courses. In addition to learning how to better organise and deliver trade union education, the colleagues from Romania and Portugal require knowledge on how to best manage it. Other training needs in the East are case studies (LIGA, Hungary), a toolkit on Social Europe (USSCG, Montenegro), and possibly Eurotrainers (assumably FZZ Poland). The delegate from ACV-CSC in Belgium claimed the need for multi-media methods, a more active and practical methodology, as well as to increase the variety of experts. The Turkish comrade from DISK asked for more insight into and/or from labour research. Supposedly, a British participant from TUC suggested improving the overall approach to trade union education.

Organisationally, the official from Montenegro (USSCG) would need a pedagogical toolkit on Social Europe whilst her colleague from Spain (CCOO) would require three: on austerity, activism and trade union youth. Participants from Portugal (CGTP-IN), Spain (CCOO) and assumingly Poland (FZZ) would appreciate train the trainer courses. The three differ, however, in perception of their ideal level and content. The Spanish participant proposed basic level training, and the assumed Polish asked for special training in Organisational Health and Safety, but left the level of education undefined. Neither the Portuguese participant nor his colleagues from UGT-P and CNSLR-FRATIA in Romania further specified their education needs. The representative from Spain (CCOO) referred to sharing best practices, methodologies and tools. The Italian CISL could do with some training on the Training Centres Network while the Portuguese CGTP-IN might necessitate knowledge on animation techniques. Assumably, the Belgian delegate from ACV-CSC and the British from TUC repeated their above opinions.

In sum, some anticipated personal and organisational training needs match while others are different. In some cases, it appears as if the surveyed representatives projected their individual education needs onto the whole organisation. Whether this is the case requires

further investigation. The survey results showed how different the development stages of the labour movement at macro, meso and micro level are – i.e., in national trade union education, union organisational development and personal progress in becoming a labour representative as well as human being. Satisfying all these needs appears quite a challenge, though, given the limited resources available to ETUI and trade unions.

6.3. Challenges to Transnational Trade Union Education

Applying the analytical framework of part II, the factors challenging the development of transnational trade union education are related to the pedagogical approach, resources (human, material and socio-organisational) and people (ETUI and union leadership, participants and competitors).

6.3.1. Pedagogical Approach

The ETUI Education Department's pedagogical approach is built on social constructivism. Seemingly, it was Garrido who brought this approach forward. The Education Director (2014, interview) tries to keep it rather flexible, though. For him, social constructivism "is a reference, not a box". Strikingly, he does not refer in any way to critical pedagogy, even though he was working as a union educator for the 'communist' Portuguese trade union confederation (CGTP) before joining the ETUI. Garrido admitted that he used Freire's framework in Portugal in the 1980s but back then, he concluded, it was a means for the alphabetisation of people. As Education Director today, he does not use Freire.

A decision for social constructivism is, conversely, a decision against the traditional teacher-centred approach to learning, which involves the student only marginally. Instead, the Education department has chosen an actor and learner-centred approach that favours participatory, experiential or so-called active learning. These ideas are similar to what Freire (1973, 2000, 2002) criticises as 'banking education,' 'problem-posing education', the 'education of answers' and the 'education of questions' (see chapter 3).

Garrido (2014, interview) attempts to bring active learning to life. From his long experience as Eurotrainer, he realised that "active learning was more a slogan". He understood, furthermore, that trade union education required pedagogical methods that are different from merely presenting knowledge. Appropriate methods would enable trade unionists to reflect, in particular, on their own experience. For so doing, he believes – interestingly, without knowing Sayer (2011) – that facilitating both reason and emotion are necessary.

This decision for active learning is not only in line with the national trade union movements in Europe and their trend towards more learner-centeredness in labour pedagogy (Bridgford & Stirling, 2000a) but equals the approach to trade union education at the international level. In collaboration with the ILO-ACTRAV, the Education department published, recently, their

new Trainers' Guide for 'designing and implementing effective learning and training events' (ETUI, 2013b). This Guide is an ode to active learning methods. Bringing these methods closer to trade unionists, the Department offered, in partnership with ACTRAV, a pedagogical workshop on active learning for 16 participants in Turin in November of 2014 (ETUI, 2014c).

Corresponding to the idea of creating more active learning subjects as opposed to relatively passive learning objects, the Education department applies blended learning. As noted earlier, ETUI Education offers English language courses completely online. The Young Leaders course blends 3 residential weeks with distance learning for the rest of the 10 month period. Except for one online introductory session, EWC training has remained predominantly residential.

For facilitating distance learning, the Education department draws on the open source course or learning management system (CMS/LMS) 'Moodle'. Unlike paid LSMs like 'Blackboard', the Australian headquartered, 30 strong moodle.org team lives from volunteers and donations. Using this CMS, hence, does not strain the Education Department's budget. The main reason for choosing Moodle is, however, of a different nature. The Modular Object Oriented Dynamic Learning Environment is designed specifically to support the social constructionist approach to education. The idea of learning through human interaction is mirrored in the possibility for students as much as teachers to actively communicate and collaborate on this platform – for example, through forums, databases and wikis. They may also download literature and other files while uploading their assignments. The Education department is currently one Moodle user of around 70,000 institutions/organisations in more than 200 countries communicating in more than 100 languages (Moodle, 2014). The Internet is, likewise, used for an electronic or 'ePortfolio'. If learners have to complete certain tasks throughout the course, they may upload them or deliver them in paper form. From both sources, the trainers can evaluate the progress of course participants in view of the determined learning outcomes. Such evaluation is, however, only part of two courses so far – namely, the Young Leaders and the Eurotrainers.

6.3.1.1. Active Learning Methods (ALMs)

Whilst both the ETUI and ACTRAV promote active learning methods, these methods are not well received by all national labour representatives.⁵⁵ After a generous lunch break of 1.5

⁵⁵ According to the ETUI-ILO Trainer Guide (ETUI, 2013b), active learning methods would include watching videos, going on study visits and doing public speeches, participating in discussions, doing presentations or simulations, or having another actual experience. These may be, for instance: After Action Review, Brainstorming, Case Study, Expert Panel, Fish Bowl, Jigsaw, Knowledge Fair, Open Space, Participatory Modelling, Peer Assist, Role Play, Round Robin, Sociometrics, Storytelling, SWOT Analysis, Thinking Hats, Timelines, Top 100 Lists, and World Café.

The scientific rationale for active learning methods, which the ETUI/ACTRAV Guide draws on, provides Edgar Dale. He contends that, after two weeks, we humans tend to remember

- 10% of what we read,
- 20% of what we heard (words),
- 30% of what we saw (pictures),
- 50% of what we saw and heard (movie, demonstration, visit),

hours, it was time on Education Day for experiencing a Knowledge Fair. The ETUI team, however, observed that several conference participants used the dedicated hour to do otherwise, in or outside the hotel, instead of going from room to room and collecting knowledge about different topics that Education officers together with Eurotrainers had prepared for them.

The dividedness about active learning methods was also reflected in the results of the survey that was issued as part of the education event. While some demanded more active learning – e.g., participants from Finland (TJS), Italy (CGIL), Montenegro (USSCG), Poland (OPZZ), Portugal (UGT-P), and Spain (CCOO) – others appeared less fond of them – e.g., Hungary (LIGA, SZEF). The latter argue that active learning methods often consume too much time while group discussions would not always be fruitful. Those who are unsatisfied with active learning methods perceived themselves as gaining more from expert presentations instead. In other words, they favoured more passive learning. The respondent from CCOO suggests a way in between by increasing both active learning methods and expert presentations.

Active learning methods and student-centred education takes more time than passive learning through teacher-centred lectures. The student is likely to require more time to gather information, discuss, make sense of and connect it to existing knowledge than if the teacher or expert delivers knowledge chunks. Through engaging with a topic, the student may build a personal connection to the content and be more likely to put this knowledge into long-term memory. In other words, active learning can facilitate deep learning as opposed to more superficial memorising. Because active learning methods need more time, however, they appear to help learning for life in general rather than training the brain for achieving a specific goal, like passing an exam. Not all active learning methods are time-consuming, though. There are a few which are as quick as some minutes, such as brainstorming or mind-mapping.

The argument that group work is not always beneficial cannot be supported. Any divergence of group members gives us the potential to broaden our horizons and expand our comfort zones. There is a point, admittedly, where group work can feel cumbersome and dissatisfying. This is often when the group or team members differ from more than they complement each other. Especially difficult is a situation when the differences are of a fundamental nature, such as when personal standards and values clash. The learner may, thus, feel hampered by external constraints from achieving the proposed learning outcomes. Whether a group selection is made arbitrarily by the teacher or voluntarily through the learner, such experiences can create anger and disappointment. This is, however, likewise a point

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- 70% of what we said (discussion, public speaking), and
 - 90% of what we did (presentation, simulation, experience) (ETUI, 2013: 22).

Active learning methods appear, hence, to stimulate more the long-term memory. What we learn through more passive learning methods like reading, listening and seeing, however, seems rather be stored in our short-term memory. Moreover, active learning can obviously facilitate deeper or more qualitative knowledge, whereas passive learning may enable broader or more quantitative knowledge.

where we can learn. It might not be the knowledge we were looking for or the results we aimed at. It may be that other valuable insights about self and others arise. In sum, it is argued that collective learning through active learning methods can always be empowering. It seems however a matter of what benefits respectively knowledge people expect and whether these expectations are met or not. Conversely, if people do not expect anything and are open for surprises, they are not prone to disappointments.

Increasing the amount of both active and passive methods would evidently necessitate enlarging education time too. Since time is money as well as a precious individual resource, the costs for ETUI courses would probably increase. Would trade unionists be ready to spend more resources on education? Working with the resources presently available, it would make probably more sense to ensure first of all that expert presentations do not remain a monologue but are delivered through engagement and interaction with the audience.

The quality and usefulness of courses appears to depend on the right blend of active and passive learning methods, one that would balance, according to the students' needs, both deep and broad learning – in other words, developing the ability to both understand and memorise. The learning experience would, ideally, also encourage participants to read and research further on their own initiative. Thus, ETUI Education may help trade unionists become 'independent learners' who have 'learned how to learn'. This seems a precondition for introducing MOOCs into European trade union education.

Respecting the diverse life experiences, 'personal epistemologies' (Bråten, 2010) and individual learning styles of learning group members may not only pose a challenge to the individual learner. The more divergent the course participants' current state of knowledge, attitude and skills, the more demanding the education activity is for the tutor. If the gap in education, learning preferences and needs is too wide, it seems a 'mission impossible' to satisfy all course participants' needs. The trainer might be unable to collect each learner from where s/he stands. Conversely, the student is likely to find the learning environment unconstructive. Therefore, careful selection of the learning group seems vital not only for the learners' own sake but also to aid in their evaluation of educational activities.

6.3.1.2. Online Learning: the Pedagogical Committee on MOOCs

Online learning in general and Massive Open Online Courses (MOOCs, in French: CLOM = Cours en Lignes Offerts aux Masses) in particular are at issue in the Pedagogical Committee. In his desire for more information and debate, Garrido invited Seb Schmoller from the British TUC to give an introductory presentation on MOOCs at the Committee meeting on 20 February 2014. Schmoller may be seen as an expert in online learning since he has been active in the field for about 20 years.

A trainer from the Spanish UGT who is responsible for online learning contends that MOOCs are nothing new since every MOOC is eventually prepared by a teacher or a teacher team. The difficulties he sees concern language and IT skills. Which language should a MOOC have? "A common platform needs a common language" (ETUI, 2014d). Moreover, most of the older trade unionists lack the necessary computer skills. Schmoller contended that the main difference in online learning regards the amount of input that teachers give in the educational activity. Per learner hour, teacher input is much lower in MOOCs than in traditional online learning. This is how education costs in the US are supposed to be brought down. The language problem is solved by learners preparing translations in 30-40 languages behind the scene.

Schmoller's colleague from TUC, who coordinates trade union education in Britain, is not quite convinced that MOOCs can address the training needs of a wide range of learners. She considers individual one-to-one education best. The biggest challenge for the teacher, therefore, is to create a learning environment that is suitable for all participants. Similar to Portela earlier, she believes however that basic level training could be delivered by MOOCs. The TUCs 60-hour core programme, i.e. what every trade unionist should know, is supposed to become "MOOCish" by autumn 2014. Nonetheless, "a 'no' to MOOCs should be because of good educational reasons", she highlights.

The representative from IG Metall was sceptical about distance learning. For him, "learning happens face-to-face, in groups, in lively situations and with pedagogical arrows. It might be useful for some topics, e.g. language and law, but political learning can't be replaced by computers and pre-designed programmes". Besides that, it should be not only about knowledge but also about its application. Most of all, however, education is about emotions, as he puts forward: it is about fears and mutual help in overcoming these. Finally, he wonders whether MOOCs are "a hype just now or a common habit to replace face-to-face learning?"

A Eurotrainer with an economic background working for the Greek General Confederation of Labour (GSEE) shares the German view. He said, "What is the added value of MOOCs vis à vis distance learning? The interaction in MOOCs seems reduced to nothing". He pushes the debate further to the extreme when he envisions that "it looks like a chip implemented in brains, a worldwide weapon". Schmoller protested that the MOOC he did felt like one-to-one instruction. Furthermore, there would be millions of people around the world who used MOOCs voluntarily. The issue was, hence, "too conventional to ignore". Nevertheless, he remains sceptical, too.

Garrido is concerned about the diverse quality of MOOCs. He finds Australian MOOCs very bad, for instance, and believes that much time has to pass before MOOCs are up to ETUI standards. A yearly report of the Open University, to which the Education Director referred, concluded that MOOCs will deserve close attention around the world in about 3 years (2016).

In addition, the Education Director raised the issue of finances. Up to now, there was only one MOOC platform, which is for free. At the same time, accredited MOOCs are costly – “and they would need to get accredited”, he stressed. Without further illustrating, he finally dropped into the debate about the new education theory that underlies MOOCs, namely social connectivism.

Building on Schmoller’s view that MOOCs cannot be ignored, a new Portuguese Committee member believe that “MOOCs are a reality”. He points to the Erasmus Plus programme, which would use “a good deal of MOOCs”. Underpinning the view from Germany, he considers this promotion of MOOCs by the EU “a challenge to face-to-face learning”.

A young observing Committee member from the Belgian union confederation, ACV-CSC, representing the view of the trade union youth, believes that young people might be attracted to this form of e-learning. He considers it impossible, though, to put on YouTube ‘how to become a trade unionist’. Therefore, he doubts that MOOCs could eventually replace face-to-face learning. By saying this, he clearly supports the comment from Germany that political education requires social interaction and cannot be learned online.

Looking at this peer group discussion overall, the view on MOOCs is apparently divided. On the one hand, they are perceived as not so much different from the current form of distance learning. On the other, MOOCs are seen as a potential means for mass manipulation. In between are those who leave open for further investigation whether this new form of e-learning might be appropriate for some particular contents. It might also be a tool for recruiting new young trade union members. Nonetheless, this group of speakers does not sound as if they considered MOOCs a form of education that would fit the majority of trade union educational activities. Almost half of the 14 Committee members present had nothing to comment. As a result, the general sense of the Pedagogical Committee about MOOCs was more sceptical than welcoming. Time will tell what place in European trade union education, if at all, the Committee will give to MOOCs.

6.3.2. Resources

In addition to structures, ETUI educational activities are the product of several resources. At issue for the ETUI Education Department’s contribution to developing European trade union identity and action are, most of all, *human, material* and *socio-organisational* resources.

6.3.2.1. Human Resources: ETUI Education Staff

Ulisses Garrido has been in charge of ETUI Education since 1 July 2011. He was preceded by Georges Schnell, who took over from Bridgford in 2007. However, Schnell does not seem to be a person who drove trade union education at the European level forward significantly. An ETUI Education officer complained that Schnell was more on travel than in his office and, hence, rather distant from his team members. Neither did Garrido speak too well about his

predecessor's achievements. In other words, between 2007 and 2011, ETUI Education had not progressed very much.

In addition to the Director, the Education department comprises, as of February 2014, six full-time Education officers as well as three full-time and two part-time Administrative Assistants. All of them are multilingual. The Education team can provide activities in four to five languages each. Together, they cover English, French, German, Italian, Spanish, Portuguese, Dutch and Romanian.

Two highly experienced Education officers who had worked for the Department for roughly two decades retired in September 2013 and mid-2014, respectively. Both were replaced, yet one was recruited not as an active trainer. Demaître needed someone to take over coordinating EWC/SERB/SNB training and improving relations with labour representatives in MNCs and ETUFs so that he could focus on pedagogical aspects. Thus, there is one trainer less than before. The trio of Education Director, Head of Research Unit 1 and the relevant Education officer held the interviews for the open positions.

A recurrent issue during the author's visit at the ETUI was the shortage in staff regarding the core area EWC/SERB/SNB. Through employing a new colleague to Demaître, part of the problem was solved in February 2014. The other part is the ongoing lack of administrative assistance to EWC training, which hampers the two Education officers from accepting more EWC training and, if necessary, sharing additional activities with their network of EWC trainers (the N.E.T.).

Theoretically, the full-time administration job has been split between two persons available half-time. Practically, one Administrator with a part-time contract is flooded with work whilst the second one supports the Education department half-time and works the other half of her full-time job for the Communication/Publication Department. Due to the high volume of work, the overloaded part-time Administrator had suffered from burn-out and was not available for a longer time. The second half-time Administrator was appointed full-time for Education in March 2014. However, due to internal rotations and one redundancy, ultimately, no replacement for her Com/Pub duties was found. Later that year, she went on maternity leave and has been gone for the time being.

The attempts of the two EWC Education officers plus the Head of Research Unit 1 to convince Garrido that recruiting new administration staff is a matter of urgency has remained unfruitful (Demaître, 2014, email). Given the preference for internal job rotations, Garrido lacks money to hire a new Administrator from the external labour market. However, as Demaître pinpoints, the core area EWC/SERB/SNB cannot be expanded if administrative support is not. This, he holds, "is only possible if the European Commission would increase our budgets... Which [...] is a big question mark. Or rather: a certainty that it will not happen in the near future" (ibid).

6.3.2.2. *Material Resources: Finance*

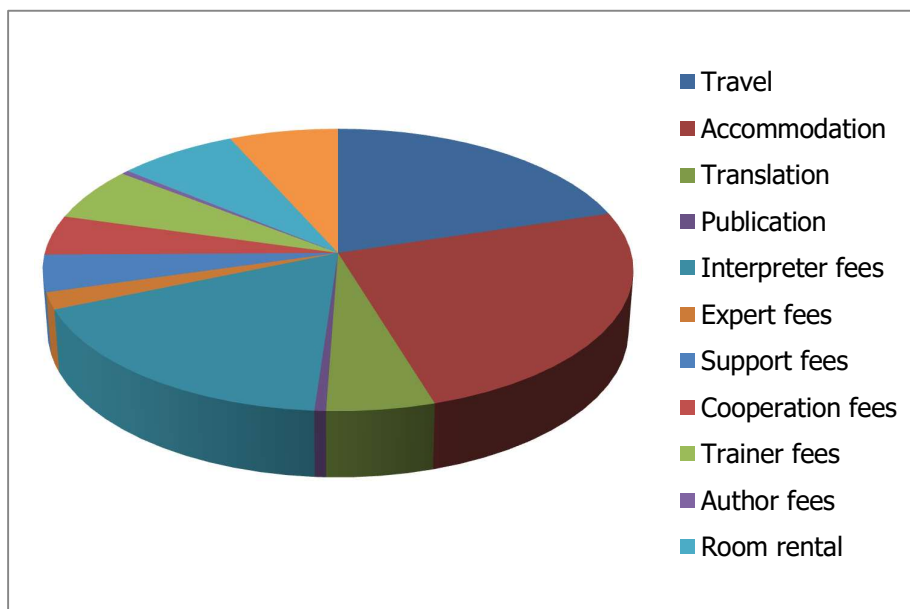
ETUI research and education activities are basically paid by the European Commission. About 85% of the Institute's income stems from European funds (ETUI, 2013d). Therefore, the Education department relies financially, to a major extent, on the Commission. The institutional donator demands to be informed and consulted about the Department's yearly work programme – in other words, how their money is spent. "The reports [...] are rather prosaic than numerical", yet they include some statistics (Demaître, 2014, email). Not just reporting conditions are attached to EU funding. What constraints the Education department must follow is outlined in the later section on 'inter-ETUI relations'.

The money available to the Education department is destined for delivering educational activities that support the policies, priorities and goals of the European Trade Union Confederation. This means, at the moment, most of all promoting a "New Path for Europe, which the ETUC (2013) published on 7 November 2013 as an alternative socio-economic model to the Troika's austerity series. This Social Compact – or "plan for investment, sustainable growth and quality jobs" – envisions the European continent as a globally competitive market in the short term and a place with a stable and sustainable economy, quality jobs and social welfare for all citizens in the long run.

The budget year always starts on 1st April. Since 2012/13, the Department has annually received roughly 2.8 million Euros from the 'guardian of the Treaty'. This is an increase of about €200,000 compared to the previous four years. In 2013/14, expenses on education courses varied notably between approximately €15,000 and €104,000. On average, one educational activity was, thus, about €43,000. For the period 2014/15, the budget is calculated by plus 100,000, at €2.9 Million. Thereof, accommodation takes a quarter of expenses (25%), travel costs account for about 20%, interpreters 17%, room rental 7%, equipment rental 6.5%, trainers 6%, translation 5%,⁵⁶ cooperation 4.5%, support 4%, experts 2%, authors 0.5% and publication 0.5% (Figure 6-1). The Commission increased the ETUI Education's budget for 2014/15 by just over € 300,000 (ETUI, 2014d).

⁵⁶ The ETUI pays 50% of translation costs if multilingual course material is used in national education activities.

Figure 6-1: **ETUI Education Budget Calculation 2014/15: Distribution of Expenses**



Source: ETUI internal document "ETUI Work Programme 2014-2015: subtotal", last modified 7 January 2014; own illustration

Given the Commission's partial donation, the Institute as much as the Education department had to finance 15% of their yearly budget through its own efforts. While this amount may appear little to the outsider, for the ETUI as well as the Education team it is rather a big challenge. As a researcher in Unit 1 explained, the Commission prescribes, on the one hand, that the Institute's income must not be generated from activities that are maintained by European public money already. On the other hand, employers are not very likely to voluntarily invest in their alleged opponents. As we see from the EWC Directive, generally, employers must rather be forced by law to redistribute money to labour. These two external constraints make it difficult for the ETUI to finance them independently. Not only seems it hard to find a project where Brussels is not involved financially, but it also seems hard to access donors outside the trade union movement who are not only sympathetic to labour but, ideally, also wealthy and generous.

On the basis of the ETUC Executive Committee decision of October 2008, the ETUI established the European Worker Participation Fund (EWPF). The Education department may access this fund for training EWCs and workers' representatives in European Companies (SEs) as well as Employee Board members. It is administered by the EWPC (ETUI, 2008). In the 2014/15 course programme, 7 plus 2 education days are available for 78 participants; these are organised through the EWPC (ETUI, 2014b). In addition, both the Research and Education departments sell self-produced books, handbooks, reports, practitioner materials, etc.

The major alternative source of income for the Education department is the course fees. Fees contribute considerably to the ETUI's independent budget (ETUI, 2013d, 2014b). They are paid either by the national or European trade unions or the individual labour representative. The price for participation is not calculated at market prices. The fees are more a solidaristic contribution to the ETUI's costs than a cover of real costs (ibid/ibid). The present full rate per training day is €60. This rate does not apply to all course participants, though. Depending on the country of trade union origin, this rate is reduced to €24 (40%) or €15 (25%). Which countries fall into group 1, 2 and 3 derives from an ETUC internal quota system. This system aims at taking account of the different financial situations of ETUC members.⁵⁷ With the current financial situation of Greece, Ireland, Italy, Spain and Portugal in mind, it appears highly controversial why participants from these countries have still to pay full fees.

Not only may the eligibility criteria for the reduced fee rates be questioned, but also the solidaristic fee calculation seems to have become somewhat unsustainable. It was, hence, mentioned at the Pedagogical Committee meeting on 9 October 2013 that price calculation is to be aligned with market prices until 2015. The calculation for EWC training is done already, and Garrido presented it on Education Day 2013. Giving priority to this education area comes without surprise since the money flows quite abundantly here: companies are obliged by Article 10 of the recast EWC Directive 2009/38/EC to fully pay for any educational activities. EWC training is, thus, a very important source of income.

With trade union membership in Europe in decline since the 1980s, the potential audience has been shrinking likewise. Conversely, the unions' financial resources for sending members to education activities for free or sponsoring them have decreased. Thus, it increasingly is the individual unionist who has to cover the costs for course fees and travel himself. Both 5-day language courses in English and French, for example, are at €900 each, which the national unions do not refund. While representatives are usually interested in doing both courses, they often report back to the ETUI Education officer in charge that, if at all, they can afford only one. Normally, they choose English (observation, PedCom meeting, October 2013).

6.3.2.2.1. Autonomy from the Commission

What consequences dependence on external resources may have was outlined in chapter 2. But how far does it really influence decision-making on the educational activities and research projects which are supposed to underpin labour? Differently put, to what extent does the current, fairly neo-liberally inspired Commission have control over how the capacities of the

⁵⁷ Group 1: Andorra, Austria, Belgium, Cyprus, Denmark, Finland, France, Germany, Greece, Iceland, Ireland, Italy, Luxembourg, Malta, Monaco, Portugal, San Marino, Spain, Sweden, The Netherlands, UK. Also the non-EU members Norway, Liechtenstein and Switzerland are charged at 100%. Group 2 comprises Croatia, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Poland, Slovak Republic, and Slovenia. Group 3 is Bulgaria, Former Yugoslav Republic of Macedonia (FYROM), Montenegro, Romania, Serbia, and Turkey (ETUI, 2013d).

European trade union movement and, hencewith, a substantial part of Social Europe are 'supported, strengthened and stimulated'?

Based on nearly two decades of experience with the Education department, the recently retired Education officer remarks sarcastically yet smartly that ETUI Education is no neo-liberal instrument – the amount of trade unionists that pass through ETUI activities would only be “a drop in the ocean [...]; the ETUI’s educational work is peanuts” (Le Douaron, 2013, interview). The number of approximately 2,000 labour representatives which the ETUI educates annually far from constitutes a 'critical mass'. Seminars, however, may help improve the situation for workers in a particular company (see e.g. Erne, 2008; Novelli, 2011). They can also bring about organisational change in trade union structures and new recognition, resource allocation, networking and political activity (see Croucher, 2004). Considering the European labour movement as a whole, however, and its overall loss of political impact in Brussels and decreasing membership counts across member states since the 1980s, ETUI Education has obviously been unable to support, strengthen or stimulate the movement on the continent significantly.

Conversely, the Education Director has to apply for funds every year and justify their amount, hoping that the Commission will be at least as generous as the previous years. The limitation to a yearly money grant and, hence, annual 'business planning' may, however, contradict the planning cycle of the national union organisations. As the DGB representative revealed to the author during the Madrid conference, the Bildungswerk is usually at least one year ahead with their planning. This difference in time horizons would make it difficult for the Education department to align their course programme to the national unions in terms of content.

This may be one reason why Garrido stated at the ETUI Long Term Meeting (LTM) on 24 September 2014 that he aims at enlarging the cycle of activities from one to 3 to 5 years. Under the same topic, different activities could be offered each year. For example, the Sustainable Development stream could deal with nanotechnology in year 1, cancer in year 2, etc., depending on what course content is necessary to complement the programmes at a national level. A longer course cycle would, moreover, increase the cost-efficient use of resources. In other words, with the same amount of resource input, a greater number of labour representatives can be educated. The high investment at the beginning of the cycle would decrease gradually through the simultaneous increase of the number of course participants. Because the unit costs per participant would drop over time, the same course could be offered cheaper in years 2 to 5. If the Department did not lower the course fees, they could invest the money saved in other education activities or research studies. Or would the Commission threaten to cut their funding if the Education department is more efficient?

Another constraint might be a particular condition under which the Commission funds the courses. For instance, the Commission could deny funding for pure trade union topics, such as 'transnational labour solidarity', and demand a more general or industrial relations concern, like 'transnational labour solidarity and different IR systems in Europe'. In such tiny details, which can make a big difference to the ETUI course offerings, the Commission's invisibly controlling hand could come yet to the surface. However, this appears not the case: "until now, the Commission [has] never refused or suggested something about [ETUI's] topics and political choices" (Garrido, 2015, email).

In sum, the Commission has some control over trade union education at the European level. It influences the educational capacities of the ETUI directly through the amount of money provided. Due to the annual donation cycle, the Commission indirectly influences the ETUI's course planning and, therefore, as noted earlier, the capacity of the ETUI and national confederations to align their educational programmes.

6.3.2.3. Socio-organisational resources: partners, advisors, networks and networking events

Likewise, European and beyond are the partners who the Education department collaborates with or provides courses for. These partnerships may be distinguished between 'inside labour' and 'outside labour' as well as 'ETUI internal' and 'ETUI external'. In 2014/15, the Education department worked externally with the ILO education centre (ACTRAV), the European Capitals Trade Unions Network (ECTUN),⁵⁸ ETUC, ETUFs, national confederations and sectorial unions. Internally, the ETUI manages the European Worker Participation Competence Centre (EWPPCC) which is utilised for EWC/SE training. Outside labour, the Department collaborates with the York Associates (UK) in terms of Languages and the University of Lille (France) regarding the Eurotrainers⁵⁹ (Table 6-3).

⁵⁸ The ECTUN is an informal network of trade unions in Europe that are based in capitals and their surrounding area. The network bases on the assumption that capital cities face particular challenges which need to be discussed and best practices should be shared. The challenges may be similar, yet the social, environmental, economic, political impact on the locality can be different. Eligible to participate in the yearly conference are delegates from national confederations who are either member of the ETUC and/or Pan-European Regional Council (PERC). Amongst others, the DGB Berlin as well as the Dublin Council of Trade Unions (DCTU) are part of ECTUN.

⁵⁹ Eurotrainers are experienced national labour educators from ETUC member organisations who have undergone special training offered by the ETUI. The Eurotrainers is, therefore, a 'train the trainer' programme. The aim of the programme is to equip national trainers for promoting a European respectively multicultural dimension in national labour educational activities. Eurotrainers may act as bridge builders between the national and European trade union level.

Table 6-3: **ETUI’s Educational Collaborations in 2014/15**

	Inside Labour	Outside Labour
ETUI Internal	EWPPC	-
ETUI External	ILO-ACTRAV ECTUN ETUC ETUFs EFBWW, EFFAT, EPSU, ETF, ETUCE, EUROCOP, industriAll, UNI Europa National confederations CCOO, CFDT, CGIL, CGSLB, CGT-F, CGT-P, CISL, CITUB, DGB, DISK, ICTU, INE-GSEE, LO- S, LPS, MSZOSZ, ÖGB, OPZZ, SEK, Solidarność, STTK, TCO, TUC, UATUC, UGT-E, ZSSS National sectoral unions Verdi	University of Lille University of Newcastle* York Associates

Source: ETUI (2014b); own illustration; * = Portela (2013, interview)

The idea of active participation, collaboration and mutual dialogue is not only enshrined in the Department’s pedagogy towards their course participants but is also mirrored in their advisory structure as well as their networking groups and events. The author was lucky to meet twice during her research period at the ETUI Pedagogical Committee. This group is composed of the ETUI Education Director and Officers, practicing (Euro)trainers from national and industry federations and other national education experts. The members are invited by the Chair, who is the Education Director, and are appointed for four years. The current Committee of around 20 people meets twice a year in Brussels in order to develop trade union education at the European level. Among them are, from Germany, Claudia Meyer (Head of DGB Bildungswerk BUND) and Joachim Beerhorst (Head of Human Resources Department, Education and Training IG Metall). Ireland is represented by Frank Vaughan, who is Head of Learning at the Irish Trade Union Congress (ICTU). Strikingly, the Nordic neighbours are represented by a voice from Sweden (Sanna Melin, LO-S).⁶⁰ Here again, “the special Nordic way” of collaboration and common approach to trade union education seems reflected (Munch Kofoed, 2015, email; also Andersson, 2015, email). “She’s the voice of common sense” (Lundén, 2015, email). This common sense appears to have a considerable implicit dimension, as the personal contact between the Nordic Education officers is rather infrequent and mostly centres around ETUI events (ibid; Melin, 2015, email).

Opposed to the direct proposals with the Pedagogical Committee, ETUI Education is influenced more indirectly through the suggestions of the ETUI Advisory Group. Once a year, the ETUI General Director plus the Director of Research meet the Group to discuss the

⁶⁰ The UK, France and Portugal are represented with two officials each. Other members are from Lithuania, Spain, Austria, Italy, Bulgaria, Greece and Belgium.

Institute's long-term strategy and innovations. At the time of writing, 21 experts – among them leading scholars such as Iain Begg, Jon Erik Dølvik, Paul Marginson, Arndt Sorge, Lowell Turner and Jelle Visser – have assessed the ETUI's work programme and progress. As a result of the last meeting on 8 July 2013, the Board suggested 5 'thematic priorities', which are Crisis and the European Semester, Worker Participation, Trade Union Renewal, Sustainable Development & Industrial Policy (includes climate change) and Working Conditions & Job Quality. These five areas are specified further through 15 recommendations on what the coming ETUI agenda should include.

Regarding networks, the Education officers have established one for each of their core training areas. Thus, there is the Network of European works council Trainers (N.E.T.), Eurotrainers (ETT), Language Tutors, and Project Management (TTUPO), as well as the Network for European Training of Young (Trade Union) Leaders (NETYL). In order to connect the national education centres, there is, moreover, the Trade Union Training Centres Network, led by the Education Director. During a two-day workshop between 27 and 28 March 2014 in Turin (Italy), 20 plus centres decided to build a new 'Community of Practice' (CoP). They aim at improving training methods and technologies with the view of increasing the impact and efficiency of trade union education (ETUI, 2014a).

Besides such regular yet smaller network meetings, the biggest get-together every year is the 'Education Day' (EDUDAY) and the subsequent two-day conference (EDUCONF).⁶¹ Invited are ETUC affiliated labour representatives, members of the Pedagogical Committee and the Eurotrainers of the different ETUI networks. In collaboration with the Spanish trade unions, the 2013 event took place from 20 to 22 November in the north of Madrid. Roughly 100 participants met in a four star hotel located in the noble district of Salamanca. Under the heading of 'Time4SocialEU – From Austerity to Democracy: A Social Contract for Europe', the more political Education Day aimed at stressing the strategic importance of trade union education for the future of the labour movement, especially in times where austerity is at the forefront in Europe and democracy under threat. The following Conference is more a trade union education internal event where those working in the field can meet, network and exchange ideas. The frame for that year was 'Train4SocialEU – Train, Act for the Future'. Interpretation for this event is provided in English, French and the host country language.

6.3.3. People

ETUI educational activities are also the product of leaders' behaviour and decisions. During the research period at the ETUI appeared two leadership matters concerning the ETUC and ETUI, which were targeted in this last section. Regarding the former, the ETUI Education

⁶¹ The first EDUDAY was held in Zagreb, Croatia, from 7 to 9 November 2012. EDUCONFs are in place 6 years longer, at least.

department is supposed to 'support, strengthen and stimulate' ETUC policies and practices. For so doing, the Department would, arguably, require support, strength and stimulation from the ETUC. To what extent does ETUC leadership practice this? Another factor that may foster or hamper ETUI Education's mandates is the level of agreement among ETUI leaders. This is not always the case, however, as the different stances of the ETUI Director and the ETUI Education Director on MOOCs exemplify.

6.3.3.1. ETUC Leadership Support

The support and acknowledgement which the ETUC pays to ETUI Education is another key issue. In fact, it appears highly questionable to what extent the ETUC actually understands the value and strategic utility of trade union education for achieving their goals. Not only do we miss, in a recent publication about the last 40 years of the ETUC by Degryse and Tilly (2013), a chapter on European trade union education, but also indicative are the two following scenarios at and around Education Day.

The presence of Bernadette Ségol at the ETUI Education Day on 20 May 2013 in Madrid may give the impression that she considers labour education important, especially in these difficult, crises-laden times. This is, at least, how Garrido as well as the ETUC General Secretary herself tried to explain her appearance. However, Ségol had never before attended either the EDU Day or the Conference since her term of office began in May 2011. She cancelled her presence the previous year in Zagreb just one week before the event, Garrido remembered, although she had agreed on this date some 6 months earlier. A meeting on Malta that would yield some good publicity was more important.

Secondly striking is the following situation: "What can trade union training do to make the union movement articulate better their vision to its members?", the ICTU Director of Learning asked Ségol in the Questions and Answers session after her speech at the EDUDAY 2013. Ségol elegantly circumvented the question. Vaughan's query was left unanswered. Disappointedly, he turned around to the author and agreed that Ségol's inability to answer his question revealed her true understanding of trade union education. The General Secretary's lack of understanding of how crucial education can be, not only for the trade union movement but also Europe's citizens, appears even more worrying given that she was a trainer herself during her previous leadership position in UNI Europa.⁶²

Garrido told the author about an earlier meeting with one of the two present Deputy General Secretaries of the ETUC. As the education material on social dialogue has not been updated for roughly two decades, the Education Director wanted to know the ETUI's current stance on the topic. In addition, he asked about their strategies regarding trade union renewal.

⁶² The information on Ségol's trainer position stems from a conversation with Garrido.

Garrido wanted to review the suitability of the Education Department's courses on union revitalisation, which focus on organising and recruiting, challenges for trade unions and possible responses and the future picture of trade unions.

The Education Director was disappointed with the result of this conversation. He felt that the Deputy General Secretary described in big words how important social dialogue and trade union renewal is while hiding the ETUC's emptiness of ideas on both trade union strategy and renewal. This affects the ETUI fundamentally, Garrido remarked, since the Institute's work and legitimacy rests on ETUC policies. According to Rieger (2014), however, the ETUC does not necessarily lack ideas. As a way out of the European crises, they came up with a 'Marshall Plan for Europe', tried to organise European action days and developed a campaign for 'The New Path for Europe'. The ETUC also discussed two proposals for a European Citizen Initiative (ECI) against wage dumping and a big investment plan. What the ETUC lacks is enforcement power and impact, as they have not moved beyond their traditional role as a lobby organisation in Brussels towards becoming a mobilisation machine in Europe.

Given this background, there may be a discrepancy between what the ETUC wants the ETUI to teach and what the Education officers consider important according to their training experiences, pedagogy and understanding of the crises-laden situation in Europe. One Education officer, for example, criticised the ETUC for being methodologically too conservative. She, therefore, tried to steer the Executive Committee towards a more critical view in the new video on which she consulted. Available on YouTube, the video is supposed to be used as innovative learning and campaign material. It illustrates in a cartoon the European crises and presents the ETUC's proposal for 'A New Path for Europe' as a way out of it. As to her opinion, the ETUI Officer was successful: the ETUC Committee eventually agreed to publish her proposal. Meanwhile, a Handbook for Trainers also exists (Caraj, 2014). Thus, the lack of meaningful direct instruction from the ETUC leaves the ETUI Education team room for autonomous thinking and more critical pedagogy.

The video criticizes the Troika for being an undemocratic and unlawful creation of several heads of EU members states, above all Germany's Angela Merkel⁶³ – neither is an establishment like the Troika documented in the Lisbon Treaty, nor was it legitimised by the European Parliament, i.e. the voice of the European citizens. These facts, however, appear not to reflect the ETUC's official stance. Where has the ETUC explicitly accused the Troika for its technocratic and illegal origin right from its beginning in 2010? Where has the ETUC used this argument for mobilising European workers and citizens for stopping austerity measures and encouraging people to envision alternatives? Despite the severity of the crisis in Europe, we have missed "a sustained tide of mass protests" (Erne, 2013: 474) organised by the ETUC. We

⁶³ In fact, the heads of EU member states of the Eurozone sent their finance ministers to ask the IMF, ECB and European Commission to control the crisis countries Greece, Italy, Portugal, Spain and Ireland.

may, hence, infer from the ETUC's apparent methodological conservatism that their political approach is too conservative as well. Martin and Ross (2001) and Martin (1996) support this point. They found that the ETUC does not oppose strongly the European institutions, particularly the Commission, due to their dependence on European funds and political legitimacy. So, we may not hear the ETUC politicising, for example, that Greece was sacrificed by the Troika on purpose for the stability of the global financial market and the criminal interests of oligarchs⁶⁴ – in other words, that the Troika is an accomplice in Greek genocide for assisting particular politicians' and capitalists' interests in money and power.

6.3.3.2. ETUI Leadership Debate: Pochet and Garrido on MOOCs

Philippe Pochet and Ulisses Garrido are not always of the same opinion. This concerns, currently, most of all the debate about online learning within trade union education. In particular, the subject of Massive Open Online Courses (MOOCs) has conjured controversial viewpoints. Pochet advocates this recent development in distance education and spent a 6-month sabbatical from November 2013 to April 2014 at Berkley University, which offers a range of MOOCs.⁶⁵

Meanwhile, in Europe, his subordinated Education Director (2014, interview) has remained sceptical about the alleged "digital revolution in education" (Herbold, 2013 author's translation) and its applicability to trade union education. "Mostly, they are a disaster", he argues, and "only 10% graduate at the end" (Garrido, 2014, interview). Therefore, Garrido demands more time for investigation and wants a debate, especially in light of the ongoing neo-liberalisation of education and its considerable number of critics and opponents, also known as the 'anti-MOOC movement'. One part of this debate is his consultation with the Pedagogical Committee, which was peered into previously.

"What is the advantage of MOOCs compared to e-learning?" the Education Director wonders (ibid). No trade union uses MOOCs at the moment, as far as he is concerned. Is it because MOOCs oppose fundamentally the widespread social constructivism in labour education? Is not watching videos merely a digital form of 'Frontalunterricht', the traditional teacher-centred 'chalk and talk' style (Lankau, 2014). Moreover, "learning remains a social process" (Dräger, 2013 author's translation). "Neither chats or Tweets nor online-friends replace real social contacts" (Lankau, 2014 author's translation). As we shall see from the

⁶⁴ Results of ARTE documentary 'Macht ohne Kontrolle - Die Troika', 2 March 2015.

⁶⁵ As a response to exploding study fees and class sizes in the US, the initial idea behind MOOCs was giving also financially less fortunate people online access to lectures of professors at elite universities. Courses are for free and certificate - but not for credit; credits require payment. Today, not only private elite universities like the founders Harvard, Stanford and the Massachusetts Institute of Technology (MIT) offer MOOCs and users can be found worldwide. The MOOCs wave has already swapped over to Europe (see e.g. Drösser & Heuser, 2013; Herbold, 2013; Lüpke-Narberhaus, 2013; Meister, 2013; Pappano, 2012).

Beckers EWC training in the subsequent chapter 7, it seems that it is from regular and constructive personal social contact that transnational collective identity can grow.

MOOCs presuppose, moreover, "independent users", Garrido's team member and pedagogy expert puts forward, because "the learning process is not guided. To use MOOCs, you have to know how to learn and find information" (Portela, 2014, interview). MOOCs have been created by universities for high level students. The least number of trade unionists, however, are those with academic education experience, she argues. Often, workers have only basic education. Hence, they need someone to guide them in their learning process. In ETUI e-learning, she explains, a tutor is usually online to launch a discussion, answer questions and assess the participants. If not, they must report back within 24 hours. In MOOCs, it is the students who are supposed to guide and evaluate each other, but they may be confused themselves about what the right and wrong answer is. Are MOOCs not more about sharing information than learning, the ETUI Officer ponders?

If MOOCs are such a controversial innovation in education, why is Pochet so fond of them? Apparently, it is a matter of ego, experience and money. "Philippe wants to be massive", Garrido (2014, interview) supposes. "Why be satisfied with 20 course participants if you can have 200,000?" (ibid). An Education officer assumes, in the same vein, that it is a way to show off. Furthermore, she explains, Pochet is no trainer. He would always work as an expert and has, thus, been used to deliver information rather than facilitate learning. After all, the ETUI Director himself is an independent user who has 'learned how to learn', the Officer maintains.

By promoting MOOCs, Pochet seems to have lost connection with the pedagogical needs of the Institute's service users. Garrido believes that this is because Pochet wants to save money by decreasing the unit costs of an educational activity per participant. Usually, a course is run only once throughout the budget year. At the moment, the cost per participant in face-to-face education amounts to between €2,000 and €2,500. Through MOOCs, the same activity could be offered several times and attended by thousands more people without spending any additional resources. If the number of participants rose from 2,000 to 20,000 per year, for example, the cost per participant would be reduced to between €200 and €250 per educational activity.

Who would gain from the unit cost reduction, though? Would current participant fees decrease or future ETUI incomes increase? Would, therefore, the single course participant or sending trade union save money directly and short-term? Or would labour representatives and their organisations in Europe benefit collectively in terms of future course offer and therefore rather indirectly and more long-term? Apart from that, was it appropriate for trade unions or a labour-affiliated institute to collaborate with those institutions that help reinforce the division between social classes and attempt to capitalise education by selling MOOCs to other universities and companies?

Despite all the criticism of MOOCs, Garrido wants to remain open-minded. Thus, he can imagine them as an addition to the present education system of face-to-face and e-learning. Referring to her argument of the 'independent learner', the Education Department's pedagogy expert suggests that maybe either simple or advanced issues could be covered by a MOOC. They might also be suitable for Mathematics or other subjects that have precise answers. For ideological issues, 'learning how to learn' and other areas where there is no one right solution, however, MOOCs would certainly be inappropriate, she reckons.

6.3.3.3. National Union Leaders' Oppositions: the Example of Spain

Spanish unions, for example, are known for their confrontational courses against each other along political lines. In the literature, it has been found that ELA has distanced itself from the two major confederations (CCOO and UGT) in order to align more closely with the radical-separatist Nationalist Workers Committees (LAB) (Köhler & Calleja Jiménez, 2013). The local Basque Country union does not agree in practice with the policies and practices of CCOO and UGT, the Education Director underpins.

Further, maybe ELA is right in separating from the two big Spanish confederations. The night before the Madrid event officially started, the Spanish press encircled UGT General Secretary Cándido Méndez in the hotel foyer in order to receive a comment on the alleged corruption affair worth of at least €1.8 million in European and Spanish public money, which has become known even beyond the Atlantic in the US (Minder, 2013). Andalusia's police and justice investigated the accusations of the Andalusian conservative political opposition that UGT Andalusia had misused subsidies for 12 years as part of a sophisticated system of undeclared money channels (Derichsweiler, 2014). The money was intended for further educating unemployed workers. The courses have never taken place, though. Instead, the confederation appears to have financed strikes, marketing material, early retirements, generous hotel meetings, etc. Schwörer (2014) speaks of 8 million Euro that were largely misused in 2009/10 through UGT's collaboration with the Institute for Education and Social Studies (IFES). Wieland (2014) reports hundreds of millions lost in two cases under investigation and does not exclude CCOO.

In addition to these moral grounds, distance from UGT seems to be beneficial for ELA in terms of transforming their representation capacities. Köhler and Calleja Jiménez (2013) highlight ELA's efficiency in organisation and negotiation. The transparency which the Basque union has obviously developed is what UGT appears to lack.

Conversely, CCOO and UGT have distanced themselves from ELA and have refused cooperative relations with the leading Basque union, given its support for Basque independence (Garrido, 2013, personal communication). UGT seems to be more confrontational with ELA than CCOO, though. Méndez did not accept being seated beside ELA

representative Unai Oñederra at the ETUI conference 2013 plenary table, nor did he allow any common pictures.

6.3.3.4. *Participants*

6.3.3.4.1. *Selection of Participants*

The target group for ETUI Education is, theoretically, all labour representatives from the 88 national trade union confederations as well as the 10 ETUC-affiliated European Industry Federations. However, the Department offers training for non-ETUC members, too, such as Euromil and the European Federation for military staff (Demaître, 2014, email). No statistics exist that provide an overview of all trade union staff in Europe. Practically, a much smaller number of representatives with transnational responsibilities attend ETUI activities because the national trade unions are responsible for the first line of education. More precisely, roughly 2,000 labour representatives pass through ETUI activities every year (Garrido, 2015, email). As mentioned earlier, roughly a third thereof are members of EWCs, SERBs and SNBs.⁶⁶

Up to now, the Education department has had limited authority over who they educate. The Education officers have no influence on the suitability of candidates (i.e., how well they match the predefined participant profile). The European and national union organisations collect the applications and send them to the ETUI. In this way, they decide who is going to be trained. Individual applications are rejected and redirected to the respective responsible organisation. Only if applicants are higher in number than the places available, which is often the case, may the Officers balance the selection in terms of organisational representation, country, sector, gender, previous participation, etc. so that a favourable learning environment can be created (ETUI, 2014b).

Lack of authority over participant selection is one of the biggest problems for the Department, Garrido shared at the Pedagogical Committee meeting in October 2013. It may also become a problem for the participants as such, though. Taking language courses as an example, a Latvian representative from LBAS emphasised in the Madrid survey that

"it is very important that all members of the group can talk, write and communicate in the same level. From my experience group was mixed and probably that is the reason why it was difficult for all members of the group be involved in discussions, understand what teacher says and that took too much time".

It follows that because the national unions are unwilling to delegate authority over participant selection, they may reduce the quality of the learning environment. As a consequence, the participants cannot learn as much and as easily as they would if the learning

⁶⁶ Unfortunately, participant statistics are not available beyond fulfilling the reporting requirements of the Commission. However, it is on Garrido's (2015, email) mind to introduce participant statistics as soon as possible, after higher priority projects have been finished, i.e. "precise the targets, to define profiles and to conceive pathways".

group was more homogenous in their level of education. The disappointment of learning experience may discourage participants from taking up another ETUI course. In other words, the national unions' inability to share power can backfire on their educational investments.

For the sake of all actors involved, it seems very reasonable that finding a "perfect selection" was a major point on the Department's 2012-15 strategy agenda. On Education Day 2013, the Director presented that "more profiles are done", yet "difficulties continue". Ultimately, he cannot decide alone in this respect. Rather, he is dependent on the collaboration of the national union organisations.

6.3.3.4.2. Potential Participants' Different Requirements

Like their leaders, trade union members are not always in agreement with each other. On the one hand, there are disagreements within the same IR regime. The Hungarian comrade from LIGA maintains in the Madrid survey that "some topics or approaches for Eastern EU participants are less useful, but [it is] very important to know on them". His Eastern colleagues from Montenegro (USSCG) and Poland (OPZZ), however, would not support this opinion. After experiencing some active learning methods in Madrid (World Café, Knowledge Fair, different kinds of group work), they demanded more of these.

Furthermore, indicative of tensions within the Centre-East is the survey participants' attitude towards report writing. Reporting about educational activities seems somewhat important to them. In fact, it appears to be a means with a twofold impact: on the one hand, it may be a basis for evaluating the educational activities. On the other, the respondents assume it will help to help improve the visibility of ETUI activities.⁶⁷

On the other hand, there are opposing views of trade unionists whose countries belong to different IR regimes. The issue of accreditation and certification is perceived dissimilarly in the Centre-East and on the Isles. A respondent from the Latvian confederation LBAS wished that ETUI courses would not remain recognised within the trade union movement only, but also officially at European institutional level. Accreditation through the European Credit Transfer System (ECTS), the European Credit System for Vocational Education and Training (ECVET) and the European Qualifications Framework for lifelong learning (EQF) would be transferable outside the labour movement. The respective ETUI course certificates would probably be issued in hard copy, like any proof of school or university graduation. Contrarily, the British TUC appears in favour of ETUI course certification along their national lines. The confederation issues Open Badges which are free of charge and stored online.

⁶⁷ Who should write the reports, though; the ETUI or their service users? The opinions on the appropriate answer vary. The Hungarian representative from LIGA states that they write course reports themselves. Her national comrade at SZEFG plus another Eastern fellow from Slovakia (KOZ SR) suggest the Education Department to do so. In return, the Slovakian official offers to take responsibility for translating reports and publishing them on the affiliates' websites if any of their representatives attended. Likewise does offer the Montenegrin official from USSCG. This means conversely, however, that she too expects the ETUI to write course reports in the first place.

Another issue viewed controversially both within and across different IR regimes is that of translation. As a result of the Madrid survey, translations are seen as a means for increasing both the usefulness and visibility of courses. Like writing reports, however, it seems to be a question of who invests resources in interpreters, translating course materials and announcements, etc., and how much. Representatives from Austria (ÖGB), Bulgaria (PODKREPA), Germany (DGB), Lithuania (LPSK), Spain and Turkey (DISK) should press the ETUI for so doing, they propose in the Madrid survey. At the same time, the Austrian confederation as well as CISL in Italy and LIGA in Hungary have taken ownership of some translation already. Officials from Finland (TJS), Italy (CGIL), Lithuania (LPS), Montenegro (USSCG) and Turkey (DISK) have offered translating of documents.

Likewise debated between union officials from different countries is the question of who is responsible for making ETUI activities more visible. The representative from the Italian FILCAMS-CISL argues that it is the national organisations that need to improve their internal communication flows. The colleagues from SAK in Finland as well as UGT-E and ELA in Spain would not necessarily agree since they had no suggestions as to what they could do to make ETUI activities more public. Many others would, however, underpin the Italian view and propose reinforcing the dissemination of information.

The unionists were not unanimous in their perception of how far they needed to disseminate ETUI news, though. In other words, the representatives seem to differ in their view of how long the reach their internal communication flow is. Does 'internal' mean one's own confederation? Or are the confederations' affiliates also considered 'internal'? The responses from delegates in France (CFTC), Germany (DGB), Hungary (SZEF), Spain (CCOO) and Portugal (UGT) relate to the former. Delegates from Denmark (LO) Ireland (ICTU), Italy (FILCAMS-CISL) and Poland (OPZZ) clearly mention the latter. Probably the Portuguese from CGTP-IN would think so, too. Officials from Bulgaria (PODKREPA), Cyprus (SEK), Finland (TJS), France (CFDT, CFT 1x), Italy (CISL), Lithuania (LPSK) and Spain (CCOO 2x) have expressed themselves too vaguely as to the length of communication flow they imagine.

Another question is whether the confederations would allow the ETUI to contact their affiliates directly. This might be especially desirable for the Education department if the confederations' internal communication flows remain too slow or are stuck completely. Given the just -described division over where the internal communication flow between the Education department and the national unions begins and ends, it sounds as if the majority of confederation officials would not like to delegate this authority to the ETUI. By contrast, a few respondents from Portugal (UGT, CGTP-IN), France (CFDT, CFTC) and one in Spain (CCOO) seem not to have a problem with sharing control and legitimacy. Quite the opposite, they encourage the Education department to access organisations and their officials in charge of education more directly and individually.

Diverse opinions may also arise within an even smaller unit – i.e., one union organisation. Sharing authority with the ETUI to access the affiliates directly is perceived differently between CCOO representatives. Whilst one proposes the ETUI Education department to “channel[] information through affiliated organizations”, another suggests better penetrating the confederations with “reinforce[ing] information to the countries”. Moreover, whilst four CCOO respondents maintain that their organisation uses mostly their own education centre to provide training, another perceives that it is another trade union education centre which the confederation utilises most (2013, survey). Yet another colleague appears unsure and points at both. It seems, hence, reasonable to assume that CCOO lacks data on their training activities.

6.3.3.4.3. Visibility

How do potential participants get to know the ETUI’s service? At the moment, the yearly course programme can be downloaded from the ETUI website. Furthermore, on the website is a yearly overview as well as a course calendar which shows, per month, which activities can be booked. Approximately three months in advance, emails with course announcements are sent to contacts in the national union organisations and European Federations for further distribution to their affiliates. Previous participants are approached, too (ETUI, 2014b). Leaflets and other print materials may be displayed at events in and outside the ITUH. As will be described in more detail in chapter 7, the European Federations are contacted individually for sketching out one or two seminars per year.

However, these efforts by ETUI Education to make their activities visible seem insufficient. “We could and should reach more people; there still is a big potential and the main problem, probably, is our visibility” (Demaître, 2014, email). The Education Director is concerned about this issue, too. Therefore, two new questions were included in the survey distributed among the participants of the ETUI Education Day/Conference 2013. The participants were asked how both the ETUI and the national (union) organisations could improve the visibility of ETUI educational activities.

The respondents suggested the Education department, most of all, push the national organisations and their affiliates to make ETUI activities more public (31%). The Department should, moreover, work on the documents (16%) as well as the (e)mails (15%) they distribute. Likewise important appears increasing the utilisation of broader networks (11%). In addition, the Education department should make better use of their homepage (10%) and other media (8%). More generally, communication (48%) as well as teamwork (42%) between the Education department and the national organisations needed enhancement. Accreditation is mentioned in 5% of suggestions whilst another 5% point to miscellaneous items.

Regarding the question how the national organisations could help the ETUI to improve their visibility, a group of 5 survey participants (12%, UGT Portugal, LIGA Hungary x2, CISL Italy, ÖGB Austria) suggested making ETUI activities more visible. One Finnish delegate from TJS plans to do so proactively. Conversely, the vast majority (88%) has not striven to do their best so far, neither proactively nor through the Education Department's requests. Many of the surveyed appear, however, open and willing to change this. Compared to in their responses to the previous query, the respondents recognise more potential for enhancing the visibility of ETUI activities through themselves, their organisations and their affiliates (43%). Also, markedly more than the ETUI, it seems the (trade union) organisations could improve their websites (19%). The respondents offered, furthermore, to help customise the documents to be published (13%) and to reinforce the dissemination of information within their wider networks (11%). Least, they perceived the need to better utilise (e)mails (6%) and other media (4%).

Similar to the previous question, the survey participants suggested that the visibility of ETUI educational activities can be achieved most of all through improved mutual collaboration between the national organisations and the Education Department. This concerns communication (42%) and teamwork (55%). Accreditation is noted in 4% of recommendations where miscellaneous items do not arise.

In general, language appears as a visibility barrier in all locations but the English-speaking Isles and Nordic countries. As will be shown in more detail later, contestation between the actors about how responsibilities and authorities are to be shared when it comes to putting the proposals in practice also seems to prevent ETUI activities from reaching their full potential visibility.

6.3.3.5. Competitors and Competing Events

Besides direct peer pressure and consultation, the Education department is influenced through its direct or indirect interconnectedness with other service providers – and, to some extent, competitors – that specialise in labour education at and for the European level. The actors can be distinguished between trade unions, commercial consultants and non-for profit organisations.

Commercial consultants are seen as rather 'business-inspired' by ETUI Education, as they use their 'non-trade union'-label to convince employers to collaborate with them. As part of this collaboration, consultants illustrate more the management perspective. Thus, they may try to incorporate business interests in labour representatives and to form management allies. At the same time, if viewed critically, getting to know the management perspective is arguably very valuable, since labour representatives need to understand where management attitudes and decisions are coming from. What sets commercial consultants apart from labour-affiliated

education services are their resources and flexibility, which are sometimes more abundant. National unions offering EWC training strive to secure their company relations. It is difficult for the ETUI to compete with both commercial consultants and trade unions in terms of EWC training, however (Demaître, 2014, email).

In Germany, IG Metall is very active in EWC training. There is also the profit-oriented consultancy EWC Academy in Hamburg that has offered educational activities for EWCs, SEs and SNBs since January 2009. There is the Christian-conservative and non-for-profit European Centre for Workers' Questions (EZA) in Königswinter near Bonn which engages in EWC training. A Bulgarian and French survey participant revealed that PODKREPA and CFTC collaborate with the latter, in addition to the ETUI. From time to time, the ETUI organises a joint initiative with EZA (ibid).

In the Netherlands, FNV Formaat, an independent consultancy close to the Dutch Trade Union Federation, is a considerable player in EWC training. The same is true for the consultants working at the Presence Group in Luxembourg as well as the London based SYNDEX, with offices in Belgium, France, Spain, Poland and Romania, and partners in Germany. Basically next door to the ETUI in Brussels is Consulting Europa, a German-French joint venture of the SECAFI Alpha Group which suggests that it is labour-oriented, but which offers corporate and public consulting in labour and social relations at the same time. Whilst SYNDEX collaborates closely with the socialist-oriented French union confederation CFDT, SECAFI Alpha is related to the formerly communist French confederation CGT (Altmeyer, 2000). In Britain, the union UNITE is quite active in EWC training (see chapter 9).

Based in the Hungarian capital, the small consulting and project management firm Solution4.org has been present on the labour and adult education market for more than 10 years. Its activities focus on Eastern Europe and Hungarian correspondence for the European Foundation in Dublin. Solution4.org has collaborated with FNV Formaat and SYNDEX, Arbeit und Leben, Verdi and the Friedrich-Ebert Foundation in Germany, the German, Hungarian and Norwegian food industry trade unions, the European Federation of Food, Agriculture and Tourism (EFFAT), the service industry federation Uni Europa, the Hungarian trade union confederation SZEF and others. In addition, there is Brussels-based SOLIDAR, a community of NGOs, which has "a wide network of education and training providers throughout Europe" (quoted from the Madrid survey).

At a global level, the International Federation of Workers' Education Associations (IFWEA)⁶⁸ offers a Youth Globalisation Awareness Programme (YGAP) and the IFWEA Online Labour Academy (OLA). The Association has affiliates around the world. Among them in Europe are

⁶⁸ "IFWEA [...] has observer status with the ILO and UNESCO, maintains close relations with the International Trade Union Confederation and the Global Union Federations, and shares mutual membership with SOLIDAR in Brussels" (quoted from the IFWEA website, accessed 16 February 2015).

SOLIDAR, UGT-P and UGT-E. Since representatives from these three organisations participated in the Madrid conference plus survey, they are probably in (close) collaboration with the ETUI Education Department. The Portuguese UGT liaises, moreover, with the Centro de Formação Sindical e Aperfeiçoamento Profissional (CEFOSAP) and the Centre for Labour Education and Professional Development. The Finnish survey participant from SAK stated that his confederation collaborates, amongst others, with Työväen Sivistysliitto (TSL), the Finnish Workers' Educational Association (WEA). Both CEFOSAP and TSL are, conversely, members of the IFWEA.

Another source of potential pressure and proposal from the international peer level is the ILO education centre, ACTRAV. Maria Helena dos Santos André remarked very self-critically in her speech at the Education Day that she is "not sure whether we are doing the right things, especially for building enough critical mass". Even more strikingly, she pointed out that "there has not changed much" since she left the ETUC as Deputy General Secretary in 2009 and returned to the labour movement as Director of ACTRAV on 2 September 2013. Like Ulisses Garrido, she is, however, convinced that trade union education is an essential tool to empower the labour movement: "workers are a social, economic and political force and they need training to develop and maintain this force". More precisely, workers and their representatives needed training to leave their comfort zones, go back to basics and discuss fundamental conceptions like collective bargaining. Also, labour requires a more global perspective and to collaborate transnationally, she argued.

One of ACTRAV's collaborators is the Global Labour Institute (GLI).⁶⁹ Dan Gallin (2014, interview), current GLI Chair and former General Secretary of the International Union of Foodworkers (IUF), supports André: "trade union education could indeed be part of developing a critical mass". He highlights, however, fundamental flaws in the movement: at the moment, the trade union base is unprepared for developing a critical mass for several reasons. Firstly, 'solidarity' is not universally defined among the worldwide trade union movement. Secondly, trade unionists are usually not interested in creativity, emotions and transformation: "it does not occur to them to think outside the box and have the determination to fight" (ibid). This is "probably not so much the members", he believes, "but more the self-limitation of the leadership. Leaders project their own limitations on to the membership, often unconsciously" (ibid). Therefore, Gallin agrees, thirdly, that leaders have to liberate themselves before they are able to liberate others.

The GLI Chair pointed to emancipatory workers' education, which was needed, on the one hand, to build the literally critical mass that both André and he envision. On the other

⁶⁹ The GLI is a network of three Institutes in New York (US), Manchester (UK), Geneva (Switzerland) and the Praxis Research and Educational Centre in Moscow (Russia). Based in Geneva as a legal foundation, its purpose is to support the labour movement in understanding the social and political consequences of our globalised economy and link labour to social movement organisations which also strive to defend human and democratic rights.

hand, emancipatory labour education appears necessary for liberating trade union leaders from the mental constraints that hamper them from recruiting, organising and mobilising the mass of workers to enforce labour rights. In fact, the GLI draws a lot on Freire, Gallin (2015, interview) revealed, particularly in their Summer Schools. As opposed to that, he describes the pedagogy of ACTRAV as “traditionally conservative [...] both politically and methodologically” (Gallin, 2015, email) as a consequence of management.⁷⁰ The previous Director, Dan Cuniah, “was hopelessly protective” (ibid). He preserved the status quo and followed the ITUC and ICFTU lines.

Not only may official labour education providers impact ETUI Education through their activities, but other (transnational) events in Europe and beyond may shape the Department’s decisions either directly or indirectly. The author attended, for instance, the 9th symposium of Critical Labour Studies (CLS) on 2 and 3 March 2013 in Oxford, UK. CLS celebrated, that year, its 10th anniversary as a British-based network of researchers and trade unionists who hold their annual conference at Ruskin College. This fairly small college has a century-long tradition of critical workers’ education. Bachelor and Master’s degrees in International Labour and Trade Union Studies are part of their core subjects. The College also provides courses for TUC affiliated unionists and co-organises the GLI’s Summer Schools.

The conference closed with the presentation of another British project which appeared particularly timely given that two lecturers at London Metropolitan University had been unfairly dismissed just a few days before the conference, in all likelihood for their trade union activism. ‘Education Uncut/4 Action’ is a novel network of 9 critical researchers as well as trade union and community activists who strive to challenge the neoliberal policy trend in privatising public higher and further education (Chadwick et al., 2013). The group met for the first time in 2012 due to their fear that the increasing commodification of adult education will mean the end of critical political thinking. Rather, if people can afford the rising fees, they would be trained even more to please market/business requirements. In this way, the gap between the ruling and the working class would deepen.

The conference attendants Kirsten Forkert, Miguel Martinez-Lucio, Sian Moore, John Stirling and other network colleagues support the radical stream of adult education, where learning is “creative, innovative and critical” (Chadwick et al., 2013). The group considers “knowledge as power” and is committed to “education as a ‘resource of hope’” (ibid). Thus, they evidently refer to the *Pedagogy of the Oppressed* and the *Pedagogy of Hope* by Paulo Freire.

As opposed to the comparably small group of about 70 in Ruskin, more than 550 people registered for ‘Global Crisis – Global Solidarity!’ from 23 to 25 May 2014 in Berlin, Germany.

⁷⁰ By politically conservative, Gallin (2015, email) means the “dominant assumption” that relations between management and labour are “consensual”, although they have probably never been in the majority of cases. By methodologically conservative, Gallin refers to “top-down lecturing, not interactive and participative” (ibid).

This international conference was organised by LabourStart, a global network of volunteers who offer online information and other support to trade unions. Held annually in different locations around the world, this event brings together trade unionists from all over the globe to encounter and discuss the most pressing issues for the international labour movement.

Roughly 360 persons gathered in the Verdi headquarters. Among them was not only GLI Chair Dan Gallin, who introduced his new book (Gallin, 2014b), but three other people whose personal experiences and possibly new contacts will, to a certain extent, revert back to educational activities at the European level. Encountered during her time in Brussels, the author met again a representative from the Turkish confederation DISK who is also involved in the ETUI Network for Training Young Trade Union Leaders. Meanwhile, two ETUI Education officers met with LabourStart founder Eric Lee in order to access his expertise for designing a new course on how trade unionists can utilise modern information and communication technology for the labour movement. The course referred to is the earlier described 'Rebooting Trade Unions: Internet and TUs', where the German DGB and the British TUC were partners in September 2014.

Conclusion

Mainly due to its direct attachment to the ETUC and financial recognition by the European Commission, the ETUI Education department may be seen as the leading service provider in the field of trade union education at the European level. In order to 'support, strengthen and stimulate' the European trade union movement, the Department aims at integrating a European dimension into their educational activities. This includes not only the course content, composition of participants and trainer team(s), but also the selection of venues. The educational activities are supposed to complement those at national level. The Department's partnerships reach from the national to the international level.

Based in the political heart of Europe – i.e., Brussels – Ulisses Garrido and his team is situated in a considerable field of tension. Pressure, proposals and other challenges arise from the top, the peer level as well as the service users at the bottom. From above, decisions are poured down from the European Commission, the ETUC, the ETUI Advisory Group as well as the ETUI General Director. At the peer level, there is the ETUI Pedagogical Committee as well as other service providers and national and international competitors. Bottom-up, the demands and choices from the European and national union confederations, their respective affiliates as well as individual service users, influence the Education Department's course offerings and other events. The bottom level is, furthermore, characterised by internal divisions that originate from both horizontal and vertical commonalities and differences in national and personal opinions.

Conversely, the ETUI Education officers try to influence the actors at all these levels towards what they consider appropriate in terms of learning material, pedagogy and topics. Regarding pedagogy, the Department has chosen an actor and learner-centred approach that favours participatory, experiential or so-called active learning. These active learning methods are mixed with more passive expert presentations. Contested between the ETUI and their service users as well as among the service users is a mix between more active and passive learning.

The Department's pedagogical approach is built on social constructivism. Their approach is increasingly challenged by social connectivist notions, yet they are rather immune to more radical-transformative ideas. Given the current crisis of labour, however, a more critical and radical approach to workers' education would arguably benefit the whole European and global movement in their efforts to revitalise. The closure towards more critical pedagogy would create difficulties connecting the ETUI learning pathways and course programme to other providers of transnational trade union education, such as the autonomous Global Labour Institute which is chaired by Dan Gallin.

As a result, discrepancies in the pedagogical approach to trade union education and suitable learning methods become apparent amongst global labour. It seems a battle between conservatism and progressive changes. The ETUI Education Director (2014, email) sounds in favour of changes: "For the new program and year, [...] I must be very ambitious. Probably I want to change not the world, but this corner". How transformative his changes will be, time will tell.

However, even if Garrido manages to transform labour education at the European level, a significant impact from these changes remains doubtful; they would affect, annually, only around 2,000 labour representatives and trade union staff. This is just a little fraction of all potential participants in Europe, especially for the assumed key service provider in the transnational field. At the same time, if the ETUI Education department is considered the reference provider for trade union education at the European level, it might have the power to set a new trend. The Department has good reason to grow, because demand is present, especially regarding EWC training.

However, would the Commission be ready to increase its subsidies for the ETUI accordingly? Given the current neoliberal orientation of the Commission, the answer is most likely 'no'. And yet, the ETUI could use other resources, internal and external to labour, for expanding its activities. These could include increased contributions from national and European trade union organisations as well as the recent legal obligation for companies to cover the cost of EWC training. The next chapter will, therefore, assess the ETUI's role in the training of European trade union and EWC representatives in more detail and evaluate the training's ability to foster representatives' transnational competencies.

7. Chapter: ETUI Training for European Labour Representatives

After providing an overview of the ETUI Education department's contribution to transnational trade union education and the factors which may foster and hamper this, this chapter explores a particular education area, namely courses for labour representatives at the European level. Special attention is given to European Trade Union Representatives (ETURs) and European company-level representatives – i.e., members of European Works Councils, European Company Representative Bodies and Special Negotiating Bodies (EWC/SERB/SNB).

ETURs are considered staff at European bodies and institutions with trade union participation (ETUI, 2013e). This includes officials in European Committees such as, for example, the European Social Fund, Social Dialogue and Vocational Training, Women, Youth, as well as the European Economic and Social Committee (EESC). It means, also, people working at European Agencies such as CEDEFOP and EUROFOUND. ETURs are, likewise, ETUC managers and members of any internal committees and working groups. Besides, as members of Interregional Trade Union Councils (IRTUCs), the Consultative Commission on Industrial Change (CCMI) and Trade Union Advisory Committee (TUAC) to the OECD, ETURs work for 10 European Trade Union Federations (ETUFs).

Where ETURs may be considered an indirect result of the European Single Market, EWC/SERB/SNB members are a direct consequence of opening the continent's economic borders. EWC activities are stipulated by EU Directive 94/45/EC and its recast 2009/38/EC.⁷¹ European Companies (Societas Europaea) are governed through SE statute (EC 2157/2001) and the associated SE Directive (2001/86/EC). Given the recent legislation, EWC/SERB/SNB members are pioneers in representing workers' interests in multinational companies. SNBs are the preliminary stage of EWCs. Members negotiate with management for the purpose of concluding an EWC agreement.

Both ETURs and EWC/SERB/SNB members have, theoretically, loads of potential to create joint labour activities across borders because they are network nodes where national union strings come together. Practically, however, these huge hubs for cross-border collaboration have hitherto not effectively worked as such. Based on knowledge from several case studies, Telljohann (2007: 151) concludes that "there is a strong need for training in order to develop the individual capabilities of EWC members to provide them with skills to deal with the specific demands arising from their role as European-level representatives".

EWCs are the longest established forums for cross-border labour representation at the firm level (Jagodziński, 2011). However, most EWC members are far from satisfied with the achievements of their cross-border efforts, and often management is not impressed (Demaître

⁷¹ An EWC can be established where a company has at least 1,000 workers in EU member states. At least 150 of them must be employed at two subsidiaries each. The subsidiaries need to be based in different EU member states.

& Jagodziński, 2011). It follows that despite nearly 30 years of practice, EWCs still lack in both effectiveness and efficiency and can, in the majority of cases, not be regarded as serious and powerful economic actors. They, rather, work below their potential and are still not up to speed. As Knudsen (2004: 212) confirms, as of yet “most EWCs have not achieved any influence on corporate management decisions” (also Bierbaum, 2001).

Probably the major reason that EWCs, workers’ representatives in European Companies (SERB) and Special Negotiation Bodies (SNBs) are chronically underdeveloped is a lack of appropriate care and consideration by the European and national trade unions as much as the EWC coordinators they appoint. As the ETUI EWC trainer Demaître (2014, email) claims, trade unions “did not pay enough attention to EWCs when it started in the nineties, and still today it is not a top priority”. This can also be seen in the fact that some trade unions, like the European Transport Workers’ Federation (ETF), do not even have EWC coordinators. The ETF explains this by preferring to deal with the roughly 20 EWC chairs/committees directly (Tilling, 2014, interview).

Another reason for the chronic underperformance of EWCs, SERBs and SNBs appears an ill-equipment of education and training. Köpsén (2011) found that experienced board level representatives in Sweden can handle traditional problems independently, but that they have not developed the capacity to manage the complex issues of today. Gold and Rees (2013) report about EWCs’ reactive behaviour instead of proactively creating their own agendas and alternative solutions to managements’ challenges, for example.

Some transnational representative bodies seem to avoid up- and re-skilling on purpose, or they may be too weak in their negotiations with management. As Demaître (2014, email) points out, furthermore, many EWC agreements are still without any training clause despite the explicit right to training in the recast Directive of 2009. Numerous delegates in SNBs are not a union member and EWCs/SERBs are often unaware of their training rights. Other cross-border officials believe that they are not in need of any special education for their roles (ibid).

What is more, not all transnational representative bodies are interested in training outside their employer. Assumably due to fear of losing their jobs and career prospects, they have, rather, adopted the common management view that training is something internal, where the Chief Finance Director gives EWC members a presentation on how to understand the annual company report, for example. Those EWCs/SERBs/SNBs who were interested in external training often face a dearth in budgets whilst management might refuse to pay – even though the Directive clearly states that any training activity is to be financed by the company (ibid).

In sum, the underperformance among labour’s transnational representative bodies seems due to a considerable number of EWCs/SERBs/SNBs whose members do not want to enlarge their horizons, are unable to access resources, are unaware of their rights, or are too afraid to claim their rights. This group of transnational workers’ representatives is certainly not only a

burden for powerful cross-border collaboration and revitalisation of the labour movement, but this group of fairly change-resistant and passive delegates is also outside the reach of trade union education.

For both ETURs and EWC/SERB/SNB members, the ETUI created learning pathways in early 2013. In what ways do these two pathways foster participants' transnational competence? The question cannot be answered straightforwardly. Rather, the picture is mixed. On a positive note, both learning pathways touch upon all six competencies which form the concept of Transnational Competence (chapter 4). However, some competencies are more addressed than others. Despite some flaws, analytic, communicative and functional competence appear covered most. Creativity and imagination fall short in reach and depth, whilst emotional abilities appear too weak at creating the power, passion and empathy needed for cross-border solidarity action. Least nurtured is transformative competence.

Due to the emphasis on head and hand, it seems unlikely that ETUI Education can facilitate uniting the workers of Europe and the world through their hearts and souls, as labour had done up to the early past century. Yet, more detail on the course contents and implementation of the learning pathways would be needed to support or disprove this result. The Beckers EWC training case provides some first clues.

The Beckers case indicates the high quality and usefulness of ETUI EWC training. The case suggests, moreover, that (trade union) education can provide five spaces: 1) a *space of encounter* (Ort der Begegnung); 2) a *space of exchange* (Ort des Austausches); 3) *space of insight* (Ort der Erkenntnis) and 4) *space of action* (Ort des Handelns). Together, they can form a fifth space – i.e., one of *development* (Ort der Entwicklung) of the person as well as a group. It appears that the EWC members have, in fact, developed some personal, collective and social identities. In order to build up their confidence while reducing their common feeling of powerlessness, a professional coach could help by accompanying the development of every EWC over time.

7.1. The ETUI's Learning Pathways

At the Pedagogical Committee (PedCom) meeting in February 2012, Concha de Sena from the left-wing Spanish trade union confederation Comisiones Obreras (CCOO) presented a research proposal for investigating the area of learning paths.⁷² Besides *Eurotrainers* and *EWCs*, one for *European Trade Union Representatives* (ETURs) was to be created. Three PedCom members from the British TUC, the Austrian ÖGB and the Bulgarian CITUB supported de Sena in her research: "the team relied on knowledge, expertise and self-management skills to envision the

⁷² Concha de Sena is responsible for international projects and education courses at the Escuela Sindical Juan Muñiz Zapico. She is also an EWC trainer.

education system that the Institute could offer” (ETUI, 2013a: 1). One year later, at the PedCom meeting in March 2013, all three learning paths were adopted.

As mentioned in chapter 8, Pedagogy and Eurotrainers is one of the five core educational areas of ETUI Education. The learning pathway for Eurotrainers is a parcours to ‘train the trainer’. European Trainers Training (ETT) is divided into two stages, each with different thematic and pedagogical courses and workshops.⁷³ Between the two stages lies an undefined period of training provision in the trainer’s respective country. The ETUI Education officer, Gabriela Portela (2013, interview), decides when the course participant is ready to progress from stage 1 to 2. Since Eurotrainers are not involved directly in transnational trade union action, this pathway is not relevant for answering the overall research question.

Another ETUI core educational area is European Works Councils/European Companies. Therefore, after de Sena’s research proposal into learning pathways, the education director, Ulisses Garrido, built around her a small focus group for deliberating about a strategic approach to EWC/SE training (ETUI, 2012a).⁷⁴ As part of the project called ‘Learning Pathways for European Works Councils’, de Sena interviewed both formally and informally around 100 EWC members and coordinators (Garrido, 2014, interview). The CCOO officer collaborated with those ETUFs that were involved (ETUI, 2013a). This means, conversely that, in line with the previous description about training for the European Federations, not all 10 ETUFs bothered about more structure and strategy in their EWC training.

Thus, despite the EWC Directive 45/EC of 1994 and the recast Directive of 2009, where the right to training was strengthened in Article 10.4⁷⁵, the EWC learning path is fairly young. EWC training at the ETUI is not, however, in its infancy. Quite the contrary, the Institute was “one of the pioneers” to offer specialised activities in the field of European Works Councils (Demaître, 2014). Merely a systematic approach to it had been missing before the current Education Director’s arrival.

Jean Claude Le Douaron had been responsible for EWC training and ETUF coordination from 1997 until his retirement in September 2013. Beginning in July 2007, Le Douaron handed EWC training gradually over to his new colleague, Bruno Demaître, whereas he then focused

⁷³ ETT 1 includes ‘Improving the Performance of Trade Unions working in Europe’, ‘EU issues’, ‘Pedagogical Workshop: Active Methods’, ‘Pedagogical Workshop: Technological/Pedagogical Resources’, and a third ‘Pedagogical Workshop’. ETT 2 comprises ‘Trainers thematic specialisation: Sustainability, Equality, Trade Unions Renewal, etc.’, ‘Pedagogical Workshop for Network animators’, ‘EWC Trainers Training’, ‘Online Tutors Training’, ‘Training Trainers in Project Management’. Additionally, course participants are required to improve their English and French language skills online and face-to-face and attend another online course on ‘European and Worldwide Trade Unionism and Industrial Relations Systems’.

⁷⁴ The focus group included Claudia Menne, ETUC Confederal Secretary and EWC Coordinator, Bruno Demaître, some ETUF officers (e.g. Isabelle Barthès from IndustriALL) (ETUI, 2012a).

⁷⁵ Directive 2009/38/EC, Art. 10.4 reads: “In so far as this is necessary for the exercise of their representative duties in an international environment, the members of the special negotiating body and of the European Works Council shall be provided with training without loss of wages”.

more on ETUFs. Demaître coordinates training for Special Negotiating Bodies (SNBs)⁷⁶ and employees' representatives in European Companies (SEs).

EWC training has, thus, over the years "grown organically" in the heads of these two trainers (Demaître, 2014, interview, author's translation). Moreover, there are lots of education materials available, but not all presentations and activity sheets are updated, not all of them have notes on the essential points to be distributed, and not all of them are on the same database, Moodle. Rather, whenever the two Education officers have been approached for delivering an education activity, they have created it from their extensive experience. One such experience, the Beckers EWC training, will provide an example of how learning path theory is implemented in practice (see section 9.1.3.2.1).

Finally, the ETUI is obliged to meet ETUR's educational needs through the Institute's mandate to serve the ETUC in research and training. The ETUR learning pathway is fully recognisable in the new 2014/15 education structure that was introduced in chapter 8. Seemingly, it served as its foundation.⁷⁷ Yet, European trade union representatives are not considered a key educational target. As we will learn from the example of ETUFs, it seems reasonable for ETUI Education not to prioritise ETUR training.

Nonetheless, EWC/SERB/SNB members as much as ETURs are, by virtue of their roles working at a transnational level, directly involved in cross-border collaboration. The EWC and ETUR learning pathways are, therefore, relevant for the purpose of this research project and analysed further below. Both pathways are structured along particular knowledge, skills and attitudes. Due to the different fields of work, the knowledge differs to some extent between the pathways. Similarities can mostly be found in skills and attitudes (ETUI, 2012a).

In both the ETUR and EWC learning pathway, the sequence of knowledge, skills and attitudes deviates from the scientific conception of education as knowledge, attitudes and skills; or cognitive, affective and psychomotoric capacities (Bloom, 1956); or, according to Pestalozzi, 'head, heart and hand' (Brühlmeier, 2010), as shown in the earlier chapter 5 on trade union education. Is it, hence, reasonable to assume that the order of education items mirrors their importance to European trade unionists and/or the ETUI Education department? Is it, therefore, right to say that the emotional part of European trade union education is evaluated as less important than cognition and capability? The ETUI Education Director (2014, interview) is aware that labour representatives need education in both reason and emotion. Le Douaron (2013, interview, author's translation) adds that, in practice, soft skills do not have their distinct place in ETUI educational activities. They are, rather, imparted between the lines

⁷⁶ SNBs are groups of employee representatives who either sketch out an EWC agreement or set up a labour representative body in a European Company (SE).

⁷⁷ What has been added in order to arrive at the new structure is a High Level Training for Experienced Leaders, an online course on Being a Trade Unionist and Citizen in Europe, some changes in the course offers in selected streams and generally more space for various and in-depth themes. The field of Eurotrainers completes the new overview of the ETUI training system, although the transnational educators have their own learning pathway.

and are touched upon only in intercultural communication exercises, because “emotions are closely intertwined with communication”. The retired Education officer highlights, too, that emotions have different places in different cultures. In the Nordic countries, which he is familiar with due to decades of residency in Sweden, emotions do not have a place in the professional world; they, rather, belong to home. The Southern countries of Europe and the world are, arguably, not as restrictive as to when and where they let their sentiments surface.

Even though emotions may show in different cultures at different times and to different extents, they are part of the labour movement as much as they are part of every human being. If emotions and other soft skills were given a proper place in trade union education, workers and their representatives would be able to deal with these parts of their humanness more consciously. Labour would then not only move closer to humanisation but also gain a powerful tool for revitalising their movement.

7.1.1. The ETUR Learning Pathway

7.1.1.1. Contents

The ETUR learning pathway determines that ETURs require certain knowledge, skills and attitudes (Table 7-1). These educational requirements not only reflect the discussion on the theory of trade union education (chapter 5) but also indicate that the ETUI conceptualises trade union education likewise. Only the order of the three educational areas differs, which we will come back to later.

Table 7-1: **The ETUR Learning Pathway**

KNOWLEDGE
1. EUROPEAN UNION
1.1 History: Different phases since its creation
1.2 Institutions and bodies: their competencies. Decision making process.
1.3 Policies: social, economic, European social model, new Social Security policies.
1.4 Legislation: social, conflict of freedoms, European jurisprudence, recent sentences, new voting procedures (reverse majority)...
1.5 “Current” situation: The new Treaty TSCG ; the fiscal compact, six pack, two pack, European governance, stability plans, austerity policies, alert mechanisms, 12 indicators,...and their consequences. Balance between democracy and markets.
1.6 Labour economy: labour market, employment development (salaries included)...
1.7 European Social Dialogue: evolution, results, current situation, future, employers organisations,...
1.8 Last economic, social and political developments. Current challenges for Trade Unions
1.9 EU integration: new challenges
2. EUROPEAN LEVEL versus NATIONAL LEVEL
2.1 Conflicts/tensions between European and national issues, interests, etc.
2.2 Different national realities: industrial, social, economic, political dimensions.
2.3 Challenges for a Trade Union collaborative action

3. EUROPEAN TRADE UNIONISM and INDUSTRIAL RELATIONS SYSTEMS
3.1. Different models, structures, cultures,...
3.2 Different national industrial relations systems : workers representation and participation, collective bargaining, minimum wages, firing systems, etc.
3.3 Last evolutions in different countries
4. EUROPEAN TRADE UNION CONFEDERATION (ETUC)
4.1 History, evolution and current situation
4.2 National confederations
4.3 European federations
4.4 Different committees
4.5 Policies
4.6 Resources available to trade unions
4.7 European Trade Union tools
4.8 Social dialogue (employers' organisations)
4.9 National confederations involvement in ETUC activities
5. INTERNATIONAL TRADE UNION ACTION
5.1 European TU tools: Social dialogue, EWCS, Frame Work Agreements,...
5.2 New TU strategies in MNEs
5.3 Corporate Social Responsibility
5.4 European Works Councils
5.5 Frame Agreements
5.6 European Union Networks
5.7 Global Unions. ITUC (International Trade Union Confederation)
5.8 World Union Councils and Networks
6. SPECIFIC POLICIES/ISSUES
6.1 Equality
6.2 Sustainability
6.3 Decent work
6.4 Working rights globalisation
6.5 Workers' mobility
6.6 TU renewal and leadership
6.7 Social dialogue and collective bargaining
6.8 Project management and funding, etc.
SKILLS
1. Communication and interaction skills: Active listening, speaking, writing, reporting, information sharing,...
2. Linguistic skills: English necessary or suitable depending on the position
3. Cross- cultural skills
4. Negotiation skills in European contexts
5. Working skills: team building and working, campaigning, networking, problem solving, collaborative leadership, decision making, autonomy,...
6. Linking local, national and Europe-wide issues
7. Anticipating and managing the changes
8. Research, analytical and assessing skills, TU "eye", (instinct, intuition)
9. Project elaboration and management
10. Strategic planning
11. Initiative and innovation

ATTITUDES
1. Acknowledgement of diversity and equity
2. Trade union values applying
3. Open and flexible mind
4. Tolerance, respect, conflicts managing...
5. Resilience
6. Competence sharing and delegating
7. Building a social Europe
8. Unions and ETUC strengthening

Source: ETUI (2013c); own illustration

ETURs must, firstly, be up to date regarding EU history, institutions and bodies, policies, legislation, integration, Social Dialogue and labour economy as well as the latest economic, social and political developments and their impact on trade unions. Secondly, ETURs should be familiar with conflicts and tensions between the European and national level, their origins in different national realities and the effect these tensions can have on joint cross-border activities. Thirdly, ETURs are expected to understand and follow the evolutions of the different trade union models, structures and cultures in Europe as well as the different industrial relation (IR) systems. Fourthly, ETURs need to know the ETUC inside out, especially its history, organisational structure, policies, resources and tools. Fifthly, ETURs should be able to build a bridge between the European and international level. This larger view involves knowledge of Global Union Federations (GUFs) and the International Trade Union Confederation (ITUC), World Works Councils (WWCs) and International Framework Agreements (IFAs), Corporate Social Responsibility (CSR) and other new union strategies in the Multinationals. Last but not least, ETURs are supposed to specialise in specific policies and issues, for instance equality, sustainability, worker mobility, decent work, renewal and leadership, social dialogue and collective bargaining, project management and funding, etc.

7.1.1.1.1. Knowledge

The range of knowledge required sounds demanding, yet it is absolutely necessary for trade union staff at the supranational level. ETURs must know the European Union inside-out as well as the ETUC. They can also be expected to be familiar with the national level in terms of industrial relation systems and working conditions in the EU member states, as much as they need to look at the international level. This broader cross-level knowledge is certainly the precondition for identifying opportunities and constraints for cross-border collaboration and action. Knowledge on specific policies and issues may provide more detailed ideas for transnational teamwork.

However, is this really all? Some important aspects seem missing, ones which are essential for trade union revitalisation. The learning agenda states the latest economic, social and

political developments and their impact on trade unions. Why are ecological developments not referred to, and their impacts, as much as the potential benefits they offer trade unions' argumentation vis-a-vis business and government? Sustainability, referred to as a special issue, may include 'Fair transition to green jobs', 'Sustainable growth', 'Nano technologies and reach', and 'Fracking for Shale Gaz?'. However, are ETURs (made) aware that the claim for sustainable growth implies acknowledgement of the limits to healthy growth?⁷⁸ The continuous inclusion of ecological concerns as well as the realisation that growth is naturally limited has transformative power: it means reconnection with nature and, hence, with self.

Also striking in the knowledge section is the emphasis on understanding the differences between European unionism and national IR systems as well as cross-level conflicts and tensions. Studying only the differences between labour in Europe would fall short, though. Whilst understanding the differences is necessary, it is not sufficient. Knowing the commonalities between systems and people is the basis for empathy and a feeling of (inter)connectedness – in short, of solidarity. Such knowledge may also provide the basis for solutions to cross-level conflicts and tensions.

In sum, the one-sided focus on understanding the differences among European labour as well as the marginalisation of environmental concerns appear to be fundamental flaws in European trade union education. These flaws prevent the movement from cultivating organic solidarity and, as a consequence, transformative competence.

7.1.1.1.2. Skills

Looking at the skills suggested, we find communication and interaction, linguistic and cross-cultural skills as well as negotiation and working skills. Communication and interaction include active listening, speaking, writing, reporting, etc. In terms of language, ETUI Education suggests English as either 'necessary' or 'suitable', depending on the representative's role. Negotiation skills are also required, particularly in a European context. Working skills mean those that are needed in daily routines, such as campaigning, networking, problem-solving, decision-making, collaborative leadership, team building, etc. Autonomy at work is also noted. Autonomy is fundamental to human motivation (Pink, 2010). Furthermore, ETURs should have the capacity of project and change managers and the ability to link issues from the local to the European level. Corresponding to this, they need the ability to research, analyse, assess and plan strategically. For so doing, European representatives are required to develop a "trade union 'eye'", which involves instinct and intuition (ETUI, 2013c: 10). Finally, they are expected to initiate and innovate.

⁷⁸ Growth is naturally limited. All living beings, such as human beings, animals and plants, reach a point in their lifetime, when they stop growing – and this is absolutely normal. Unlimited growth is an illness: only cancer grows unlimitedly until it has eventually destroyed its host and, therefore, its basis for existence. In other words, any advocacy for unlimited growth is the safe way to social suicide and economic collapse.

Taking a closer view on this plethora of proposed skills, three points deserve to be highlighted. First, English has been chosen as default language for ETURs. No other language requirement is mentioned, although French and German are certainly important EU languages, given their dominant political role. This means that trade unionists from the UK, Ireland and Malta are not obliged learn a second language in addition to their official mother tongue(s). As one result, the comparably few officials from the English-speaking countries have a resource advantage where the mass of delegates from all other European countries have a resource disadvantage. Has the capitalist spirit of imbalances and division between privileged elites and under-privileged grassroots crept in here? Do the British, Irish and Maltese ETURs practice solidarity and commit themselves officially to learning any other language that would suit their work context? The ETUI offers also French.

Besides the moral issue of the trade union value of equality, English native speakers would do well to learn at least one other language for more rational – i.e., economic – reasons. Multilingualism would benefit not only the individual worker, labour representative and trade union staff through a competitive advantage on the national labour market, but it would also be beneficial for the whole country by providing a competitive advantage on the world market. Foreman-Peck from Cardiff Business School calculates that the British people's habit of resting on 'their' English and/or not taking other languages to a professional proficiency level costs the UK economy around 3.5% of GDP per year (Pawle, 2013), worth 48 billion Pounds the country losing annually in economic growth because companies do not have workers with the appropriate foreign language skills to trade more internationally. This economic disadvantage is likely to apply to Ireland as well.

Secondly striking is a mismatch between the skills and knowledge sections. On the one hand, ETURs are supposed to be familiar with trade union activities, actors and tools at an international level, such as strategies regarding MNCs, global unions and international framework agreements. On the other hand, they are expected to link only local, national and European issues. Why would ETURs need knowledge of international trade unionism if they are not supposed to link issues from the local to the global level? Admittedly, understanding the international labour level is useful for facilitating a more holistic picture of the labour movement and, thus, 'connected knowledge' (see chapter 5). This knowledge, however, remains disconnected from skills development, as the learning path does not seem to anticipate any possibility of applying it. At the same time, 'working rights globalisation' is mentioned as a specific issue. Likewise are 'equality', 'sustainability', 'decent work', 'workers' mobility', 'trade union renewal/leadership' global labour issues, whilst 'social dialogue and collective bargaining' could very well be made a matter for global unions. Arguably, in our globalised world, any labour issue can be internationalised. Therefore, it seems necessary to add to the skill-set required the ability to link not only local, national and European issues, but

also global ones. Is this a serious strategic flaw in ETUI Education or just a careless writing mistake in the presentation?

Truly remarkable is, finally, that the learning path includes the 'sixth sense', 'inner voice' or 'gut feeling' – in other words, intuition. Intuition is seen as a means to research, analyse and assess. In other words, it is a tool to navigate decisions. However, the two words 'intuition' and 'instinct' are written only in brackets. One may, hence, be inclined to think that training European delegates in listening to and following their belly hunches is dealt with only marginally.

7.1.1.1.3. Attitudes

The list of attitudes seems confusing. Instead of mere attitudes, the compilation seems more a mixture of skills, characteristics and attitudes. For example, to apply trade union values is a skill. To appreciate and follow trade union values would be an attitude. However, what values are we talking about actually? Unfortunately, they have not been specified. The 2014/15 course programme refers here and there in their course titles and descriptions to democracy, equality, sustainability, solidarity and equity. (In)justice, the heart and fuel of mobilisation, does not appear (see Kelly, 1999, and others on mobilisation theory, chapter 2).

Building Social Europe and is, likewise, a skill. The urge to build Social Europe would be an attitude. Making ETURs want to build Social Europe requires, first of all, a strong and 'concrete utopia' (Bürgin, 2014 following Ernst Bloch) of what they should use their skills for. So, what was Social Europe initially about? What is it at the moment? How is Social Europe supposed to look like in the future? In one of her last speeches as ETUC General Secretary, Bernadette Ségol (2015) set out her view on these questions:

"Social Europe was built through decades of vision, commitment and hard work. [...] Today's Social Europe is not in good health. [...] What policies are needed to put social progress back at the top of the EU agenda? First of all, good-quality jobs and sustainable growth, to improve lives. [...] Human capital – investing in people to create social wealth. This means better education and lifelong learning for all, to ensure workers have the skills needed in a sustainable economy. [...] A fair society needs strong trade unions, independent social dialogue and collective bargaining, and sound national industrial relations systems".

Apart from the fact that Ségol reduces European citizens to an economic and social resource, she does not specify any concrete measures for what 'good jobs', 'sustainable growth', 'better education', 'fair society', 'strong trade unions' and 'sound IR systems' are. Whilst these visions provide a reasonable start, they do not have any mobilising power because they are too nebulous. What are ETURs expected to fight for exactly? Are they encouraged to imagine a Social Europe that goes beyond the European Health Insurance Card (EHIC)? How

about fighting for a European unemployment insurance, a European pension system, European nursing insurance or European accident insurance?

Furthermore, conflict management is a skill. Being pro-active in conflict situations and striving for win-win solutions would be an attitude. Resilience and patience are, arguably, more traits than attitudes. The willpower to fight for labour's rights and not give up or in is possibly meant here. Strengthening unions and the ETUC can be both a skill and an attitude. The difference between both is whether I can do it (ability) and whether I want to do it (willingness). Likewise, both can be 'autonomy', which can be found among the skills.

In summary, the contents of what European Trade Union Representatives are supposed to know, feel and do appears quite appropriate. Nevertheless, there is room for improvement. In the knowledge section, more emphasis on environmental concerns as well as other commonalities among diverse European labour seems essential. Both would strengthen the feeling of solidarity, as would English native speakers learning a second European language other than their mother tongue(s). Moreover, the skills collection had to be adapted to the knowledge requirement to link issues from the local to the global level. Training the connection to one's intuition deserved likewise more acknowledgement. For the field of attitudes, much clearer definition and disentanglement from other concepts seems highly necessary. Which trade union values are meant exactly? One is probably solidarity. But does every labour movement member understand the same of this concept? Dan Gallin (2015, interview) says no: "the definition of solidarity is not universal in the trade union movement. But education can help". Before education could help, however, the ETUR learning pathway needed arguably more precision of attitudes.

7.1.1.2. Implementation

In the following section, the European Trade Union Federations are taken as an example how the ETUR learning pathway is implemented.

In fact, we cannot speak of implementation, really, because ETUFs have not been eager to train on the ETUR path. Instead, they continue to ask the ETUI to deliver the educational activities they consider necessary. This practice is a relic from earlier times. Before 2000, ETUF training was largely sponsored by the Germany-based 'New Technologies and Learning in Europe Foundation', as the ETUI did not have an own budget for the European Federations. Therefore, the ETUFs still believe that the money available to them is theirs, and they can use it how they wish (Le Douaron, 2013, interview).

Thus, the ETUI builds the frame and the ETUFs decide on its content as well as who is invited to participate (Caraj, 2013, interview). The relation between ETUI and ETUFs is rather informal between ETUI Education officers and ETUF leaders, Le Douaron adds, who passed on

his responsibilities to Marie Caraj in 2013. In effect, the educational activities for ETUFs are only roughly in line with ETUC strategy (ibid).

Every year, between 12 and 14 educational activities are organised for and with ETUFs (ibid). Between April 2012 and March 2013, Le Douaron trained 349 participants in 14 activities. Thus, on average 25 participants met in several European countries for 2 or 3 days (Belgium 4x, Portugal 4x, Italy 2x, Austria, Germany, Hungary, Lithuania). The starring Federations were industriAll (3x), EPSU (3x), UNI Europa (2x), ETUCE (2x), EFBWW, EFFAT, EFJ, and ETF.⁷⁹

IndustriAll debated about how to better coordinate Social Dialogue activities in the Federation as well as trade union and national workers' representation bodies at company level. They also investigated into employment forms and representation for young workers. EPSU deliberated similarly about how youth organising could help revitalise public sector unions. They also wondered how to respond to the challenges posed by the EU's austerity governance and to better coordinate collective bargaining in public services. EFFAT pondered over negotiation of more decent, inclusive and mobile work for young workers while the EFBWW aimed at taking the integration of migrant workers to the next level. The EFJ reviewed the journalists' unions in Europe in terms of European networking and other best practices. The ETUCE met twice for 'training on crisis', i.e. to find alternatives to austerity measures. UNI Europa thought about establishing union alliances in MNCs and *improving trade union coordination of EWCs*. The ETF got obviously the same yet customised seminar on the latter.

From the above topics becomes apparent why Le Douaron (2013, interview) argues that ETUF activities are not really education and training – they are rather seminars or meetings. The purpose of education and training would be for different representatives to get to know each other without decisions being necessarily taken. The activities can deal with various topics, and case study examples are provided by the trainer. Seminars, on the contrary, provide a place for an often familiar group of delegates and committee members to discuss political issues and exchange their respective best practices. They do so with a view to making decisions and coming up with a common strategy on how to tackle their problem at hand. Case study examples originate hence from the participants. In other words, seminars are more a place to brainstorm and solve a particular problem, where education and training provide rather rooms for transforming the mind-set.

Therefore, seminars are not part of a long-term strategy. Rather, they are organised on a yearly basis and deal with immediate issues that the Federation perceives in need of debate. As Cristina Tilling from the European Transport Workers (ETF) confesses:

⁷⁹ ETUI internal document.

"We unfortunately don't have an education policy as such, at [Federation] level. In designing our training workshops for the EWCs we usually have a more practical rather than strategic approach, in the sense that we try to respond to the needs of various EWCs, as they occur" (2014, email).

Remarkably, she insists on not making public this lack of strategic approach to trade union education in general as well as the roughly 20 EWCs they have.⁸⁰ The two handfuls of EWCs are apparently neither worth employing some specific coordinators. The ETF prefers direct contact, usually to the EWC chair.

With this in mind, Tilling is obviously well aware of her Federation's flaws in respect of education, but cannot officially admit it, probably due to internal micro-political reasons. Bluntly speaking, ETF leadership seems to deny utilising education as a strategic tool for organisational development and eventually trade union renewal. In other words, change is not in the Federation's leaders' interest, and/or they are afraid of transformation.

As opposed to Tilling, EPSU official Pablo Sanchez (2014, interview) had no problem in admitting that the public services federation does not have any organisational strategy regarding education and training. The two summer schools which EPSU has hosted so far can be seen as an improvement towards a more strategic approach, though.

Although ETUFs decide unilaterally on the contents and participants of their seminars, Le Douaron (2013, interview) tried to influence their decisions by proposing topics himself. He compiled a seminar outline plus materials and sent it on to the responsible coordinator. During the last two to three years, he achieved particular success in terms of youth seminars. IndustriAll, EPSU and UNI Europa followed his call. The latter, for example, actually wanted cadre training but the ETUI officer decided that a seminar for the trade union youth would be much more important. He found an ally in the youth representative of UNI Europa who was able to convince the Federation's leadership.

However, Le Douaron was not always successful in steering ETUF's training decisions into another, probably more useful, direction. He perceives it very difficult to influence ETUFs' decisions on education and training. The success in persuasion seems a matter of people and their attitudes; and the decision-makers in the Federations are mostly old men: "if you have a grandpa, send him to Brussels" (ibid, author's translation) is usually the motto, the retired ETUI Education officer jokes.⁸¹ These people aged above 50 would often be resistant to learning and hence resistant to change. Moreover, as stated earlier, they think that the money assigned to them for training is still fully at their discretion.

Dirk Linder (2012, personal conversation), who is member of both the Siemens General Works Council and IG Metall, noted likewise sarcastically that labour representatives in

⁸⁰ Her statement will, therefore, be omitted in the publication of this research.

⁸¹ Another version goes: 'if you have a grandpa, send him to Europa'.

international roles are often individuals who got this position not because of their suitability. Rather, since redundancies are considered bad among labour, those people had been promoted sideways for reasons of outdated views or other interpersonal inconveniences.

So, apparently, conservatism rules not only in the ETUFs. Would it make sense to re-educate all the 'rusty' union officials? Le Douaron (2013, interview, author's translation) expresses his doubts in a Swedish saying: "you cannot teach old dogs how to sit". Dan Gallin suggests likewise: "rather retire [...] the older generation [of] trade union managers than reskill them". Although the GLI General Secretary's body is 84 (born 1931) years old, his mind sounds very young and refreshing. The ICTU Global Solidarity Champion and CPSU member, Martin Gallagher (2012, personal conversation), puts it more radically: "a lot of the older generation must die and the younger must come to the fore".

Overall, ETUFs seem to largely neglect the need for more structure in their staff development. Since ETUI Education does not prioritise ETUR training, ETUFs are probably not the only European labour organisations which do so.

7.1.1.3. Evaluation

As part of the annual ETUI Education Day and subsequent Conference, the author conducted a survey for the ETUI Education department in November 2013. Since ETURs are not a core educational area for ETUI Education, the survey was not designed to provide any data on the perceived quality and usefulness of the ETUR learning pathway. Moreover, except of one member of the European Economic and Social Committee (EESC), no ETURs attended the event in Madrid. Unfortunately, the EESC member did not respond to the questionnaire. Therefore, it is impossible to make any statements about the ETUR learning pathway from the view of European trade union staff.

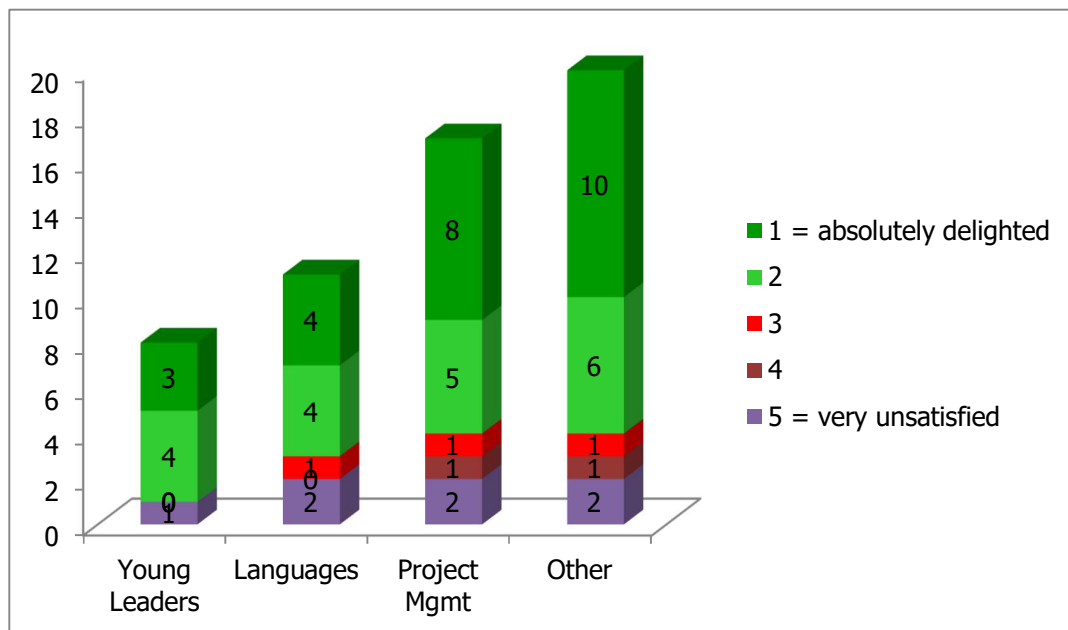
However, the delegates from the national confederations who participated in the Madrid survey can give us some hints on the quality and usefulness of some ETUI courses which also ETURs may attend. In particular, ETUI Education was interested in how the service of their core educational areas is received. Therefore, data is available for the flagship course of Young Leaders in addition to Languages and Project Management. The respondents were able to state any learning experience outside the ETUI key areas under Other.

Table 7-2: **Quality of ETUI Courses**

Course Name	Ratings					Evaluations
	1 = absolutely delighted	2	3	4	5 = very unsatisfied	Total
<i>Young Leaders</i>	3	4	0	0	1	8
<i>Languages</i>	4	4	1	0	2	11
<i>Project Mgmt</i>	8	5	1	1	2	17
<i>Other</i>	10	6	1	1	2	20
Total	25	19	3	2	7	56

Source: Madrid survey; own illustration

Figure 7-1: **Quality of ETUI Courses**



Source: Madrid survey; own illustration

As table 7-2 as well as figure 7-1 show, the vast majority of survey participants are (absolutely) delighted about the quality of courses which they attended. Within this group, the amount of best evaluations (25) is only slightly higher than that of second best ratings (19). There is however also a marked number of answers (12) which hint at some respondents' (considerable) dissatisfaction about ETUI courses. Only a small number of them (3) seems not really enthusiastic about their learning experience with ETUI, but find neither aspects which are really bad. The overall very positive outcome notwithstanding, the notable dissatisfactory evaluations indicate room for improvement.

What about the usefulness of courses? Likewise, the vast majority of survey participants finds ETUI courses (very) useful (47). The amount of best evaluations (32) is double as much

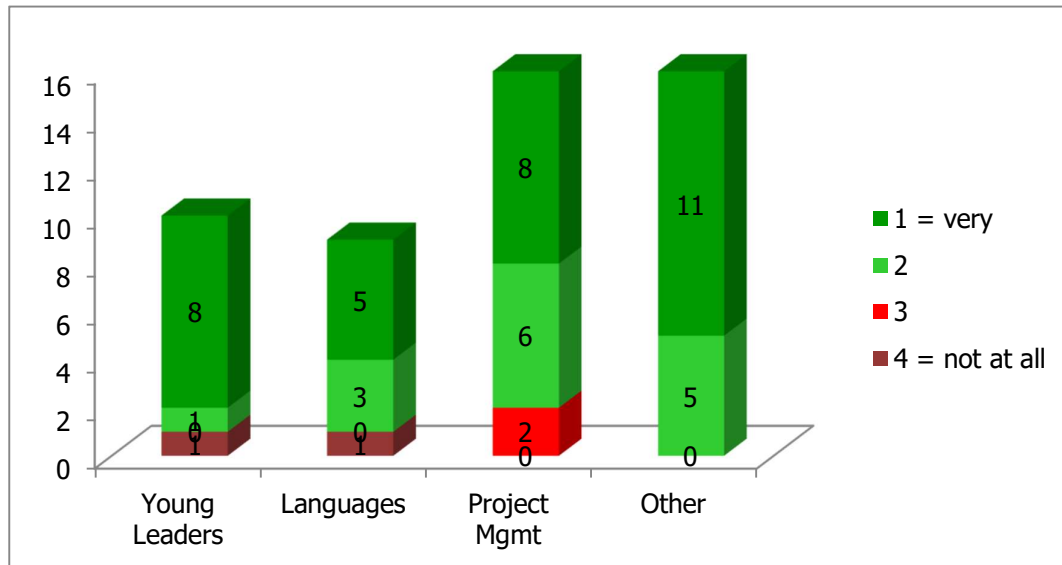
as second best ratings (15). Only a few national service users obviously feel that their or others' participation was or will not be (really) fruitful (4) (Table 7-3, Figure 7-2).

Table 7-3: **Usefulness of ETUI Courses**

<i>Course Name</i>	Ratings				Evaluations
	1 = very	2	3	4 = not at all	Total
<i>Young Leaders</i>	8	1	0	1	10
<i>Languages</i>	5	3	0	1	9
<i>Project Mgmt</i>	8	6	2	0	16
<i>Other</i>	11	5	0	0	16
Total	32	15	2	2	51

Source: Madrid survey; own illustration

Figure 7-2: **Usefulness of ETUI Courses**



Source: Madrid survey; own illustration

It follows that the usefulness of courses is perceived more consistent than the quality of courses. In other words, ETUI courses appear more useful than valuable in quality. Yet, both quality and usefulness appear quite high in general. We must however keep in mind that the survey is non-representative and that a little of responses are not backed by own experience.

7.1.1.4. Conclusion

The ETUR learning pathway contains particular knowledge, skills and attitudes which are supposed to make European trade union staff fit for their cross-border and cross-level work. The emphasis of training lies clearly on knowledge, as this section outweighs the others in amount and detail. Attitudes appear not only the least in number, but also in specification. The selection of knowledge, skills and attitudes, i.e. their quality, sounds yet quite appropriate. However, in all three areas seems room for improvement in regards to enhancing transnational competence, particularly transformative competence.

Does the ETUR learning pathway contribute to the ETUI Education department's strategy to develop European trade union identity reflecting the EU's motto 'united in diversity'? Does the pathway help building the pillars of an open mind, mutually respectful treatment as well as a sense for learning, sharing and building solidarity? The picture is mixed.

The ETUR learning path relates explicitly to open-mindedness, respect and sharing. An attitude for lifelong learning is not listed, though. Neither is solidarity clearly mentioned, but must be assumed among the general regard to trade union values. Reference to networking and linking from local to European level is made, but these skills are obviously not foreseen to span further to global level. The skills' reach seems hence too short.

Most strikingly, the pathway concentrates on outlining the differences between European labour without highlighting the similarities. Similarities are however the basis for solidarity, sharing and networking, and not the differences. Thus, diversity is illustrated, but ETURs are probably not facilitated enough in creating unity. The lack in knowledge may prevent the desired attitudes and skills from growing. This result underpins the interconnectedness of the education triangle respectively head, heart and hand.

The theoretical shortcomings in the ETUR learning pathway regarding European labour identity in general and the development of unity in particular could be a lack of thinking through ETUR's educational needs. The shortcomings might also be a result of the ETUI Education department's assumption that the feeling of unitedness originates self-evidently from day-to-day work in a transnational environment as well as other cross-border practice. Since joint cross-border labour action has remained rather the exception than the rule, however, this assumption seems unlikely to prove true. Rather, due to the lack in theory as well as practice of unitedness, ETURs stay probably focused on the differences. This focus is arguably not encouraging for cooperating across borders and transforming social, economic and political structures in Europe and the world.

In sum, the ETUR learning pathway supports, strengthens and stimulates European identity building only selectively, where a few but fundamentally hampering factors seem to prevent the fostering items from reaching their full potential. Therefore, the pathway does not fully

underpin ETUI educational strategy. Rather, the pathway seems to work against ETUI strategy to some extent.

European labour organisations and committees appear to work against ETUI strategy too, for they do not follow the ETUI’s proposition to use labour education as a strategic tool. As we have seen, neither do the ETUFs use the ETUR learning pathway, nor do probably other targeted trade unions and related bodies. If they did, ETURs would surely become another key educational area for ETUI Education. Moreover, including education in organisational strategy is inevitable for trade unions to achieve their goals from local to global level.

Can we conclude the same for the ETUI learning path for European Works Council members and other supranational company representatives? The following part will explore this question.

7.1.2. The EWC Learning Pathway

7.1.2.1. Contents

Like the ETUR parcours, the EWC path determines – again in the same contested order – a range of knowledge, skills and attitudes. As regarding the ETUR pathway, it is noteworthy that the categorisation of the pathway in terms of knowledge, skills and attitudes mirrors not only the discussion on the theory of trade union education (chapter 5), but also indicates that the ETUI conceptualises trade union education likewise.

As opposed to the ETUR pathway, this framework takes account of the level of representative maturity of the body respectively its members. A distinction is made between EWC 1, EWC 2 and EWC 3-5 plus all other (Table 7-4). These life stages of EWCs may be read as beginner (1), intermediate (2) and advanced (3+).

Table 7-4: **EWC Learning Pathway: Contents According to Development Stage**

SUBJECTS	EWC 1	EWC 2	EWC 3, 4, 5...
KNOWLEDGE			
1. LEGAL FRAMEWORK			
1.1 Legislation applied to EWC	+	+	
1.2 EWC Agreement	+	+	
1.3 Employee representation systems	+	+	
1.4 Directive 2002 on information/consultation	+	+	
1.5 Other Directives: ES, site relocation...		+	
1.6 1989 Charter of Fundamental Social Rights	+		
2. COMPANY FRAMEWORK			
2.1 Structure of the company	+	+	
2.2 Social mapping of the company	+	+	
2.3 Linking national and European issues	+	+	+
2.4 Financial and economic situation		+	+

3. TRADE UNION FRAMEWORK			
3.1 ETUC	+		
3.2 ETUFs: Role and responsibilities	+		
3.3 Coordinators: Role and responsibilities	+		
3.4 National organisations	+		
4. EWC FUNCTIONING			
4.1 Multi-linguism, multi-culturalism,...	+		
4.2 Good communication	+		
4.3 Effective coordination	+		
4.4 Effective application of EWC agreement	+	+	
4.5 Good search and use of information	+	+	+
4.6 Good response to consultation		+	+
4.7 Tasks planning and organising	+	+	+
4.8 Reporting	+	+	+
4.9 Experts support	+	+	+
4.10 Creating European strategies for common issues	+	+	+
4.11 Right articulation EWC rights/national rights	+	+	+
4.12 Change anticipation strategies			+
4.13 EWC: proposing and innovating body			+
5. EWC ACTION and TRADE UNION STRATEGIES			
5.1 Monitoring national and local consultation procedures and trade union rights	+	+	+
5.2 EWC and sector coherence	+	+	+
5.3 National and local collective agreements	+	+	+
5.4 Identification of EWC and/or national issues	+	+	+
5.5 Action plan	+	+	+
5. TOPICS EWCs might deal with at EUROPEAN COMPANY LEVEL			
6.1. Financial data	+	+	+
6.2. Health and Safety		+	+
6.3. Sectoral overview and company strategies		+	+
6.4. Vocational training			+
6.5. Employees´ data protection		+	+
6.6. Equal opportunities		+	+
6.7. Social minimum standards (IFA, CSR, OECD Guidelines...)	+	+	+
SKILLS			
1. Communication and interaction skills	+	+	
2. Linguistic skills	+	+	+
3. Negotiation skills	+	+	+
4. Working skills	+	+	+
5. Striking the balance of national and European	+	+	+
6. Research, analytical and assessing skills	+	+	+
7. Strategic planning	+	+	+
8. Anticipating and managing the changes		+	+
9. Project elaborating and managing			+
10. Initiative and Innovation			+

ATTITUDES			
1. Acknowledgement of diversity and equity	+	+	+
2. Trade union values applying	+	+	+
3. Open and flexible mind	+	+	+
4. Tolerance, respect, conflicts avoiding-solving	+	+	+
5. Competence sharing and delegating	+	+	+
6. Resilience	+	+	+
7. Building a common transnational body	+	+	+
8. Trade unions and ETUFs strengthening	+	+	+

Source: ETUI (2013d); own illustration

7.1.2.1.1. Knowledge

Like in the ETUR path, knowledge is separated into six headlines. Due to different duties of ETURs and EWC members within yet the same European and international context, some knowledge is different whilst other is same or similar.

Firstly, EWC representatives have to be familiar with the legal framework. This includes of course the applicable EU Directives as well as the respective national transpositions, such as on EWCs, Information and Consultation, European Cooperative Societies (SEs), etc. It involves also the EU Charter of Fundamental Rights as well as the own EWC agreement. Remarkably, it is moreover referred to both differences and similarities of the national IR systems in the EWC countries, whereas the ETURs appear rather geared towards the differences only.

Secondly important is the company framework. EWC members must know about the company multinational and -level structure as much as its economic-financial situation and employment conditions. They must also know about MNC strategies in general.

Thirdly, EWC representatives need to be aware of the trade union framework, i.e. the ETUC, ETUFs, EWC coordinators and national organisations.

Fourthly, EWC members are expected to understand what factors influence the (well)-functioning of their representative body. These include fairness in multi-lingual and multi-cultural concerns, definition of the body's role, good communication, effective coordination, effective application of the EWC agreement, good response to consultation, project management, standardised and continuous top-down and bottom-up reporting, expert support, good research skills and use of information, anticipating organisational change strategies, pro-activity and innovation.

Fifthly, EWC representatives should prepare actions in coherence with trade union strategies more generally and the respective sector in particular. For so doing, they need to remain up to date with national and local developments regarding information and consultation and collective agreements, but also International Framework Agreements (IFAs). Additionally, the representatives must know how to distinguish between transnational and national issues and prepare action plans.

Finally, EWC members are supposed to identify topics which are a case for European company level, such as data on company strategy and finance as well as the sector overall, health and safety, vocational training, employees' data protection, equal opportunities, social minimum standards (IFAs, Corporate Social Responsibility, OECD guidelines, etc.).

Whilst the above compilation of knowledge sounds quite appropriate at first sight, some issues demand closer attention. Since EWCs bring together several national company representatives, the bodies' potential to create joint transnational action is very high. However, nowhere in the EWC learning path is referred to knowledge on how labour mobilisation and action is triggered. As we know from mobilisation theory (chapter 2) as well as the paradigmatic European Citizen Initiative the Right2Water, campaigns, strikes and other trade union actions do not evolve, because people know about institutional frameworks. Knowledge on national and international institutional frameworks, such as OECD guidelines, ILO labour standards and the UN Charta of Fundamental Human Rights, etc. may feed the perception of power, which is vital for mobilisation (see chapter 4). The key for taking transformative action, however, is the perception of injustice. In other words, for taking action, we first must consider emotionally a situation unjust. Then we evaluate rationally the legal, mental, physical, etc. power we have and evaluate whether our means are sufficient for a successful outcome.

International Framework Agreements and Corporate Social Responsibility (CSR) claims can be powerful resources for communicating a creative line of argument to management. These documents give EWC members the potential to defeat business leaders with their own commitments. In addition, companies which violate, for instance, OECD guidelines, ILO labour standards and the UN Charta of Fundamental Human Rights make themselves very vulnerable, because their corporate image is at stake. Consumers might buy another brand once they knew that their product was manufactured through child labour, inhumane working conditions, trade union hostility, etc. Such conscious decisions can unfortunately not be expected from the mass of consumers. Therefore, the transformative value of CSR seems questionable. It might be improved through collaboration with social movements.

Furthermore striking is that the ETUI seems to exclude important issues from level 1 and 2 courses of the EWC pathway, whilst others are seen as an educational matter of the first stages but not beyond (see table 7-4). 'Health and safety', a 'sectoral overview and company strategies', 'employees' data protection', and 'equal opportunities' are not foreseen for level 1. As we will see from the Beckers case, however, health and safety can be a formidable first topic for new EWCs to build constructive collaboration with management, because both share common interests. Similarly, 'employees' data protection' and 'equal opportunities' could be topics to proceed with, since they do not affect companies' core business. At the same time, EWCs should arguably understand early on the factors that influence employers' decision-making, such as sectoral conditions and company strategies. This knowledge is important for

the information and consultation process, in particular for proposing topics and preparing opinion statements. Questionable is also why 'multi-linguism, multi-culturalism, etc.', 'good communication', and 'effective coordination' are at issue in level 1, but not thereafter. Arguably, these key issues for success cannot be taken for granted after initial training, but must be worked on continuously.

Moreover unclear is why EWCs are suggested to delegate the issues of 'financial data', 'health and safety', 'sectoral overview and company strategies', 'vocational training', 'employees' data protection', 'equal opportunities', 'social minimum standards (IFA, CSR, OECD guidelines)' to their comrades in European Company Boards. Labour's strengths is always at the bottom of the movement, not at the top. Rather, the top must reinforce the bottom. Therefore, EWCs should be facilitated to consult and collaborate with colleagues in the Boards. Delegating fundamental issues to Board level would not only demobilise EWCs, but also reflect corporate structures.

The EWC framework's emphasis on reporting in all EWC maturity stages appears therefore vital, and is hopefully meant across levels, i.e. both bottom-up and top-down. Like collaboration with Board members, this would reflect one idea of New Labour Internationalism (see chapter 2). The attention to developing EWC members' research skills seems on this background equally inevitable.

Somewhat inappropriate seems, however, to distribute knowledge on the EWC as a 'proposing and innovating body' only from stage 3. It would benefit supposedly every EWC to become confident in the 'driving seat' as early as possible. Furthermore notable is an inconsistency between the knowledge and skills section. If the skill of anticipating and managing changes is supposed to be developed from intermediate stage, it is unsuitable that knowledge on 'change anticipation strategies' is considered advanced.

7.1.2.1.2. Skills

The skill-set which the ETUI foresees for EWC delegates differs to the one proposed for ETURs just in a few little details.

Firstly, English language proficiency is not regarded necessary but 'suitable'. The fact that English is chosen as common language makes sense, since this is not only the corporate language of most MNCs, but also often the second language in non-English-speaking countries (Le Douaron, 2013, interview). By the same token, it sounds astonishing that English language proficiency is merely considered a 'nice to have' instead of a 'must have'. How do EWC members want to communicate with managers in different countries and read international company documents if they are not fluent in the very language which transnational corporations usually use? EWC members may also avail of French courses.

The ability to speak a common language is moreover a team-building factor, between EWC members as much as between EWC members and management. Likewise, ETUI EWC education activities could be considerably cheaper if no translation of documents and speech would be needed. Maybe cheaper training costs could be an argument for EWCs to negotiate additional training time as opposed to the commonly meagre two to three days per year? At the same time, as argued earlier, multi-linguism is important for working in a transnational context. So, English as the agreed common language of the European and international labour movement should not be seen in reductionist terms, but as a platform to build from.

The second difference between the ETUR and EWC path is that 'campaigning' in the working skills section is omitted whilst 'collaborative leadership' is given an extra bullet point and rephrased as 'integrative/participative management skills'. As mentioned before, EWCs can be a formidable space from which joint cross-border campaigns and other actions can arise. It is thus incomprehensible why EWC members are not encouraged to develop respective skills. It seems as if campaign management is reserved for ETURs. However, even if EWC members lack resources to manage campaigns, they should at least be prepared, as much as any other trade unionist, to actively participate in campaigns. This skill is transferable from the local to global level. Participation in transnational campaigns as well as any other cross-border activity can enhance representative's attitudes and, eventually, their European (labour) identity.

Thirdly, to the EWC path has been added 'awareness of the different roles of the individual members at home and in the EWC'. However, is 'awareness' really a skill? Arguably, it is more a state of mind than a skill. Therefore, it should have rather been added to the knowledge area. What is meant is probably the ability to recognise the potentially common and conflicting interests of individual EWC delegates which may arise due to their double representative function at the national and supranational level.

Interestingly, neither in the ETUR nor in the EWC learning pathway is reference made to media contact skills. Regarding the latter, this would fit to avoiding conflicts, though.

The vast majority of skills are deemed essential at any life stage of a EWC. Like the attitudes, developing communication/interaction, language, negotiation, team-working, links between the national and European level, research and strategic planning is to be integrated into any education activity. Change anticipation and management is assessed as more intermediate learning material whilst project management appears more advanced. Why, however, is 'initiative and innovation' considered a matter for advanced EWCs only? It corresponds to the earlier criticism that EWCs are developed as a 'proposing and innovating body' only from stage 3. However, given the predominant reactive behaviour of labour and its difficulties coming up with viable alternatives to both neo-liberal capitalist economic and

political prerogatives, it can arguably never be early enough for building pro-activity and creativity.

7.1.2.1.3. Attitudes

Similar to skills, the group of attitudes has been copied almost entirely from the ETUR path, except the following: whilst ETURs are required to manage conflicts, EWC members are supposed to avoid conflicts but shall solve them, obviously, once they have occurred. Which conflicts are meant is not specified. Referring to chapter 3 and the distinction between inter and intra organisational rivalries, we may assume that conflicts between EWC and company management are anticipated. It could also be conflicts within the EWC.

On the one hand, conflict avoidance can be a well-thought out strategy. Sometimes, the wise head gives in to avoid one battle now with the view to spending resources on more important and maybe cumulated issues in the future. In other cases, however, resilience and patience may be the appropriate strategies. Resilience requires inner strength sourced from self-confidence, courage, self-efficacy, ideals, peace of mind, intelligence, creativity, drive to pro-activity, perseverance, etc. Resilience may also be an adequate means to solve conflicts, as much as patience. Sometimes, problems will solve themselves.

However, coming from a space of mind and heart where conflicts are actually not wanted, problems would probably be solved through rather quick and cosmetic solutions instead of thorough and fundamental ones. This attitude may also lead supranational company representatives to develop a fear of confrontation and, thus, learn reactive behaviour and subjugation. Consequently, conflict avoidance can be the sure road to concession bargaining at the expense of workers because their representatives would give in to employers' demands too soon for the sake of interpersonal harmony. EWCs which are focused too much on the company and trying to please management are, moreover, in danger of neglecting the broader trade unions' vision of a more social and democratic Europe and society. In brief, cosmetic solutions, concession bargaining and a strong company focus are counterproductive, not only for strengthening the European labour movement, but also for transformative change.

Considerably contradictory to conflict avoidance is not only the expectation of EWCs strengthening the ETUFs (whilst ETURs are supposed to strengthen the ETUC), but also the vision of a 'proposing and innovating body' as well as the urge toward (ETUI, 2013d: 5) 'building a common and transnational body' (where ETURs are asked to build Social Europe). In other words, EWC members are expected to cultivate a mind-set of creating instead of waiting. Like the ETUR pathway, one aim of EWC training is to develop a transnational group of people that is pro-active and wants to think 'outside-the-box'. This would certainly include setting up agendas for meetings with management as opposed to letting management dictate both time and content. In fact, putting issues on the table and seeking discussion with

management can be the beginning of a campaign or any other form of mobilisation and, as such, the initiation of transformation.

New in the attitude section of the EWC learning path is a reference to patience and 'finding a common systematic approach to work on a topic'. However, can 'finding an approach' be called an attitude? Arguably, it is more a skill than an attitude. Attitudes go much deeper as they describe an underlying intrinsic motivation to a certain choice of behaviour. Attitudes are about the willingness to gain and apply knowledge and skills. So, in question here is not the 'process of finding' as such, but the 'fire to start' the process of finding. Likewise, the willingness to be resilient and patient is an attitude, whereas resilience and patience are character traits. Character traits certainly influence the development of attitudes.

Thus, since the list of attitudes is essentially the same as that for ETURs, the earlier discussed confusing mixture of skills, characteristics and attitudes applies also to the EWC educational framework.

Attitudes are considered as important as being educated throughout all life stages of a EWC. Remembering the above comment from Le Douaron, that emotions are not dealt with consciously but, rather, are covered in between the lines, attitudes are probably neither educated consciously. In other words, it remains doubted that the various concepts like diversity, equity, trade union values, openness, tolerance, etc. which clearly involve the heart element, are studied separately. But, if the assumption is correct, it is highly contradictory to give attitudes a visible importance while their place in education activities is kept rather invisible.

7.1.2.2. Implementation

Based on the educational framework outlined, a training system with certain courses has been developed for EWCs. The Education Director introduced a revised version of it at the Education Day 2013 in Madrid. Comparing the initial path in ETUI (2013c) with the newly presented one, there have not been any major changes. Despite some minor modifications in wording, the content has remained as follows:

- *Starting* EWC (The Rules of the Game, Improving EWC Performance)
- *Strengthening* EWC action (Health & Safety, Environmental Sustainability theme, the Company's Training Policy, Corporate Social Responsibility, in-depth theme)
- *Expanding* EWC action (Anticipating Change, MNCs' Economic and Financial Strategies, New Trade Union Strategies for MNCs, in-depth theme)
- *Creating expertise* (Advanced Financial Analysis of the Company, Initiative and Innovation, highly specialised theme)
- *Communication* (English for EWC, Communication Techniques for EWC)

Additionally, there is an online course in the *Systems of Industrial Relations and Worker Representation*.

In terms of changes, 'The Rules of the Game' is now provided online, while French language training was dropped. On the question of why French was dropped, Garrido (2014, interview) put forward a copying mistake. Every EWC delegate is, nevertheless, free to choose a French course from the general ETUI training programme. There yet appears undecidedness on how to better support those transnational labour representation bodies which are in their initiative phase. The module *Starting EWC* is to be developed further.

Generally, course content is grouped into basics, special themes and advanced themes (Demaître, 2013a). The basics include, most of all, knowledge on legislation, expectations of both EWC and management as well as the ability to evaluate the own EWC agreement and practice. Advanced contents involve business strategies and financial analysis, European institutions and court cases, English/French language training, sustainability, CSR, health and safety, etc. Special topics comprise European IR systems, linking the national and European level, sharing experiences and best practices with other EWCs, intercultural communication, cross-border collaboration, policies and priorities of ETUC and ETUFs, planning and running a meeting, etc.

The contents are distributed through mixed-methods (i.e. presentations and active learning methods) (ETUI, 2013f). The latter can encompass brainstorming, small group work, behaviour modelling, individual analysis, case studies, simulations and group building tasks, business games, etc. Le Douaron (2013, interview) stresses that EWCs do not accept the typical 'chalk and talk' style, because this teaching method does not respond to their particular situation. Therefore, not all active learning methods would suit them, such as a World Café, for instance.⁸²

The course system is, however, a marketing tool for company specific solutions, Demaître (2014, interview) argues. It would be more of a general impression of what the ETUI could offer than a concrete elaboration of EWC educational activities. The learning contents cannot be fully defined upfront because they are always tailored to what the EWC members and coordinators perceive necessary – and, if the service users only want presentations, they get only presentations.

To what extent presentations only can achieve the purpose of EWC training is questionable, though. The purpose of EWC training is to challenge and change attitudes and points of views, increase the representatives' critical faculties and share the problems they face at home with

⁸² World Café: "open and creative dialogue is encouraged through this method, designed to share experiences and insights. Moving in rotations through several working groups evokes a collective knowledge and cross-fertilization that is capable of illustrating new ideas and solving problems" (ETUI, 2013b: 25).

their colleagues from abroad, as Le Douaron (2013, interview) describes. This process requires time, up to several days, as well as an evaluation of the educational activity.

Between July 2007 and December 2013, Demaître (2013a, 2013b) delivered 123 EWC trainings. The number of education activities had risen steadily from 7 in 2007 to a peak of 34 in 2011. In 2012 and 2013, the demand for EWC training dropped slightly to 32 each. Thereof, in both years, the ETUI officer gave 13 himself and delegated 19 to his Network of (currently) 16 EWC Trainers (the N.E.T.) (Demaître, 2014, interview). The N.E.T. was established in 2012 (Demaître, 2014).

Whether the decreasing trend in the amount of EWC/SE training indicates a downward trend is doubtful. The EWC business does not appear to suffer from a lack in demand. Quite the opposite, Demaître describes situations where there were about 90 individual applicants for only 20 places. Is the rise in demand for EWC related training a positive result of the recast Directive and its explicit recognition of training? Or is it due to the number of EWCs, which has soared from 8 in 1985 to 1,061 today (ETUI, 2012b)? Possibly, it is a combination of both. Further research would be necessary to answer these questions. Nonetheless, the target group for ETUI Education, as well as their competitors, is over 20,000 transnational labour representatives who are presently member of a EWC, SE or SNB (Demaître & Jagodziński, 2011; Demaître, 2014).

On average, each of the education activities spanned 1.8 days (Demaître, 2013a). Strikingly, whilst the number of activities rose continuously, the average amount of training days fell. Where in 2007 and 2008, EWC training lasted, on average, 2.3 days, in the peak year of 2011 it was only 1.5 days. In 2012, the average amount of training time increased slightly to 1.7 days.

The 122 EWC trainings concerned 84 companies (ibid), 21 of which have their headquarters on the American, Asian and African continents. Most of them are from the US (15). In Japan are 3 whilst 1 each is based in Canada, Singapore and South Africa. In Europe, most EWCs stemmed from French (21) and Belgian (10) companies, whilst the least came from German (8), Swedish (7), Dutch (6), British (4), Italian (2), Danish (2) and Finnish (1) enterprises.

The companies are linked to 7 ETUFs. The majority of trainings were held by corporations connected to Uni Europa (26) and the European Metal Workers (22). Fifteen concerned the EMCEF and 10 can be attached to EFFAT. Least involved were the EFBWW (6), EPSU (3) and the ETF (2).

Given the overall expanding trend in EWC training at the ETUI within the past 8 years, Le Douaron, Demaître plus the N.E.T. were able to meet all the diverse training needs despite the absence of a formal educational framework. In fact, due to shortcomings in administrative support (see chapter 8), Demaître had to reject several requests for company specific activities. Among them were also requests from novel clients.

Being constrained by finance and staff from developing further the EWC service users is not just highly frustrating for the educators, but short resources for EWC/SERB/SNB training may also be fatal for the ETUI as an organisation for two reasons: firstly, training for European company-level representatives is profitable for the ETUI because the companies are legally obliged to pay for it. If the most important source of self-financed income dropped, the Institute would increase its dependence on funding from the Commission whilst decrease its ability to achieve the 15% own funding rate (see chapter 8). Secondly, by declining clients due to lack of capacity, and the Education department's competitiveness on the labour education market may suffer. As was described in chapter 8, there are several other actors in Europe who offer EWC training, be it other trade unions or private consultancies.

Losing EWCs is also a concern of the Pedagogical Committee. This fear is, however, one of the reasons they put forward to justify an official structure for EWC training. The number of educational activities might drop if the Education department neglected to increase their tailor-made EWC training and "continue[d] to concentrate on trade unionism and the fight against employers" (ETUI, 2013a: 2). More structure would enable the Institute, moreover, "to sell EWC packages" and "offer courses to individual members of European Works Councils from different countries, different companies, different cultures, etc." (ibid).

With the steady growth in ETUI EWC training in mind, however, PedCom's argument does not sound fully convincing. Both Le Douaron and Demaître, as well as their N.E.T., have obviously managed to deliver EWC packages. EWC members who seek individual education in addition to the one or two collective EWC trainings per company per year are free to choose courses from the ETUR pathway, from ETUI's cross-industry EWC courses and from their national unions' offers. They could also push their respective ETUF to organise further EWC-related educational activities.

Possibly, PedCom's intervention into the hitherto 'natural growth' of EWC training at the ETUI is a power exercise for different reasons. One reason is the issue of knowledge management in the Institute. Without a formal educational structure for EWC training, all wisdom in the Education officers' heads would be gone once they left the ETUI. Another reason which supports the idea of a formal structure in EWC training is the consistency in training quality.

Overall, the EWC course system is seen as a lifelong learning project (ETUI, 2012a), probably not only for the life of EWCs but also the life of the ETUI Education department. Thus, steps were taken in 2014 to "strengthen, expand and professionalise this very particular service of the ETUI Education department" (ETUI, 2014e). In February, an additional full-time Education officer was hired to support Demaître (see chapter 8), and the N.E.T. met in Prague for three days. As a result, the coordination of training for the ETUFs shall be improved as well as the contacts to the companies deepened. The learning pathway shall become more specified

through separating it into educational units and defining course objectives and learning outcomes. In this respect, novel ideas on active learning methods (see chapter 8) were discussed. Also it was acknowledged that existing training materials required updating whilst new topics are to be added (Demaître, 2014).

In conclusion, it is difficult to give a clear answer on whether the EWC educational framework supports transnational labour action. The mere fact that EWC training exists in both theory and practice is positive. With regard to the above discussion of knowledge, skills and attitudes, the learning pathway facilitates cross-border labour collaboration between companies to some extent. Yet the flaws which have been identified are likely to hamper EWC representatives from exploiting their full potential, individually as much as collectively.

Thus, 32 EWC trainings annually sounds a considerable achievement for the ETUI. Given 52 weeks per year, on average, more than one EWC training takes place per week. The question however is what impact the trainings have on EWC members. Whilst this question cannot be entirely answered in this research project, the following example of how EWC learning path content was implemented may provide some first indications.

7.1.2.2.1. The Beckers Case: ETUI EWC Training in Praxis

The Beckers EWC training lends itself well to assessing the ETUI's application of its EWC learning pathway for two reasons: firstly, the Beckers EWC is very new; secondly, we have access to it.

AB Wilh. Becker is the parent company of two international operations, namely Becker Industrial Coatings (BIC) and ColArt, which are headquartered in Berlin (Germany) and London (UK), respectively. The two subsidiaries are called the Beckers Group and employ around 3,000 employees worldwide in the chemical industry. Their European activity spans across the Benelux, France, Germany, Italy, Poland, Spain, Sweden and the United Kingdom. AB Wilh. Becker is owned by the Swedish family business Lindéngruppen AB. The Beckers Group EWC agreement came into effect on 1 January 2013.

Because of the novelty of both the agreement and the training event, as well as the fact that it was delivered by the assumed leading provider of EWC training at the European level, the Beckers case can be considered a critical case for illustrating the role which trade union education can play in enhancing transnational labour collaboration. It is proposed that educational activities can enhance transnational labour solidarity by creating five spaces: 1) a *space of encounter*, 2) a *space of exchange*, 3) a *space of insight* and 4) a *space of action*. Together, they can form a further space for the *development* of the person as well as the group.

Informal face-to-face conversations were held with the EWC coordinator and three EWC members during the training days. Follow-up emails were sent to both the EWC coordinator and the chair. For triangulation purposes, a questionnaire was sent to the course participants. Six of eight representatives from France (3), UK (1), Sweden (1), and Germany (1) replied. The five men and one woman are all unionised.

The Beckers EWC training was initiated and organised by the EWC coordinator from the Swedish white-collar union Unionen. The Coordinator also involved Joacim Björk, representing Lindéngruppen and AB Wilh. Becker, Dave Gray, as EWC chair, and Demaître from ETUI. Since Demaître had other commitments that prevented him from running the training himself, he asked for suitable volunteers in his N.E.T. The former colleague Le Douaron was the quickest to answer. The EWC coordinator finalised the course programme with him and was sitting beside the retired ETUI trainer during the session as a non-participant observer.

The training took place from 9 to 11 December 2013 in a four star hotel close to the ETUI in Brussels.⁸³ The EWC had met seven months earlier in London for the very first time. The delegates were a selection of 14 EWC members from 8 countries. The group of eight came from France (4), UK (1), Sweden (1), Germany (1) and Poland (1). They met in order to

- familiarise themselves with the new legal standards for EWCs and compare them to the practice and the EWC agreement of Beckers;
- improve communication and cohesion among the members and deputies of the EWC;
- familiarise the participants with the differences and similarities between the systems of worker representation in the European Union in general and the Beckers subsidiaries in particular;
- be able to anticipate changes in the company and represent the workforces' interests;
- develop a common view and understanding about the role and responsibilities of the EWC representatives.

Six translators (2 German, 2 Polish, 2 French) facilitated cross-border communication, where English was the relay language. The transnational trainer, Le Douaron, switched between German, French, English, and he spoke Swedish like a native. Due to Swedish literacy, he is likewise professionally proficient in Danish and in Norwegian. The executive manager involved in the planning participated constructively from the first evening until the following afternoon in fluent English. Before he left, Björk offered to take health and safety as a first

⁸³ The choice for a four star hotel leads to assume that the ETUI transforms trainings to 'luxury activities' and spends money on (too) expensive accommodation that could rather be spent on the quality of education. However, the choice of four star hotels is actually first and foremost of organisational nature: three star hotels "have no meeting rooms with dimension for our courses – [...] we need not only space for the participants, but also for the boots of interpretation. [...] A 3 star [hotel] has no solution for our dimension, for our needs" (Garrido, 2015, email). Hotels are chosen only if trade union schools and training centres cannot provide appropriate facilities (ibid).

topic for collaboration. Not all EWC members appreciated his participation, though, as some felt inhibited from talking freely.

For the effectively two training days, the ETUI invoiced Lindéngruppen at almost €28,000. This includes the cost for interpretation (40%), hotel accommodations and catering for 12 people (26%), administration (22%), as well as the trainer's travel and expertise (12%). In the EWC chair's (2014, email) experience, "management see the EWC as a pain in the backside in terms of the amount of finance and time resources. [They have] little interest in the social agenda". Rather, what management attempts to gain in return is better access to foreign markets (ibid).

Figure 7-3: **Beckers EWC Training Room**



Source: own illustration

The educational activity was a learning opportunity in many ways.

Space of Encounter (Ort der Begegnung)

As a residential activity, the Beckers training was, firstly, an opportunity for the EWC members to meet each other in person. As the Swedish delegate (2013, email) described, "I had possibility to [...] meet the old and new nice people, of course". Since the EWC had met once before, the training provided space to meet some national colleagues, the EWC coordinator as well as the management representative again. New people were the trainer, the translators, the IT technician and the author.

New for the participants was also the Brussels venue. Thus, educational activities are also opportunities to meet people (again) in a different environment. Usually, this environment holds two different settings, with one more formal than the other. The training room is more formal because, here, the participants are asked to perform tasks. Coffee/lunch breaks, dinner

and any other informal situations inside and outside the training room invite people to speak about more than work-related issues. In this way, EWC members may encounter known and previously unknown people, gaining insight into their behaviour and learning of different circumstances from several perspectives.

Space of Exchange (Ort des Austausches)

Thanks to the space of encounter, the EWC training offered opportunities for the Beckers delegates to communicate with each other and other people. The communication flow went in multiple ways. The participants received information rather passively by listening to and observing the trainer's PowerPoint presentations. Sometimes, both trainer and the group posed questions to each other. The trainer also encouraged the group to share information more actively amongst themselves. This included past theoretical knowledge and practical experiences, present opinions and future ideas.

The introductory session, for example, was an opportunity to present oneself and exchange facts regarding everybody's country, national industrial relations system, challenges at work and personal hobbies. In so doing, the trainer created a basis for further formal, more work-related and more informal, personal communication. It was also an initial opportunity to recognise 'mutuality despite difference' (Hyman, 2011b) and acknowledge how immersed in 'united in diversity' the supranational labour representatives actually are.

Mutuality showed itself not only privately in some hobbies, but also professionally in their experience as local labour representatives. Sharing the challenges that the EWC members had been facing with their local employers for approximately the last two years seemed to provide an especially welcomed opportunity to open up and release their emotional pain. With the exception of the Swedish delegate, the author could see the desperation in their faces and hear the feelings of powerlessness and insecurity through their speech. Their anger concerned not only management and their often disrespectful and deceitful behaviour, but also inefficiencies in the production process as well as the damage these can cause to the health of both employees and nature.

Besides local challenges, local solutions were discussed. The German and the Swedish colleague, for instance, shared information on the production conditions in their respective subsidiaries. Through exchanging knowledge on Swedish best practices and German, both delegates are now in a position to better evaluate their own situation. Moreover, the German comrade has now got a powerful argument to create upward change in production which can be seen as a triple win for employees, environment and business expenditure.

Space of Insight (Ort der Erkenntnis)

Thirdly, exchanging information may result in hearing contents that we already know and learn anew. Thus, the EWC activity invited participants to reflect on self, others and context.

Offering reflections started during the educational activity. In a conversation with the author, the German delegate realised at the second evening that “in London, I was a stranger. Here [in Brussels] I am already a bit better” (10 December 2013, author’s translation). Initially put up as a reserve member, he came to feel more comfortable among his colleagues, since he was meeting some of them for the second time. The EWC chair concluded at the end of the session in plenary that “training gives you confidence – and confidence drives things”. A French Select Committee member suggested after the final lunch that the EWC had become more of a team.

Reflections continued beyond the training days, too. The German delegate believed that “the more we meet, the better we will get to know each other” (quoted from the survey, author’s translation). At the same time, he found the training too short. Another French Select Committee member realised that the training provided her with plenty of information that will enable her to better fulfil her supranational duties. The Swedish and a third French delegate agreed, similarly, that they gained better knowledge of their tasks as EWCs. Remarkably, whilst the former stresses his individual representative role, like the aforementioned French Select Committee member, the latter refers to “notre” (our) EWC as a group.

Thus, thanks to the deliberations which the EWC training encouraged, all course participants arrived at new insights. These illuminations concerned the individual representative as much as the collectives they are committed to.

Space of Action (Ort des Handelns)

The increased confidence which the EWC chair noted earlier is very likely interconnected with the fourth function of labour educational activities: namely, to provide opportunities to act in a safe environment with immediate feedback from an expert. (As noted earlier, however, the perception of safety may decrease with management presence.)

In order to act, the participants were confronted by the trainer with case studies, which either mirrored or were taken from the real world. The cases were a compilation of ten anonymised real life examples from other EWCs which the ETUI trainers had come across. They related to ‘whipsawing games’ and trade union recognition (as was outlined in chapter 2), closure in combination with relocation and wage freeze, profit-sharing schemes, training for employer and employees, the use of experts, and acquisitions.

The cases demanded arrival, in pair work, at a common position or proposal, a common (communication) strategy to implement, a common approach to problem-solving or a common

decision on suitable behaviour in a particular situation. Every pair had one case on trade union recognition in common and one different.⁸⁴ Five case studies were then discussed in plenary.

Such exercises are supposed to prepare the participants for similar upcoming situations so that suitable common approaches, strategies, communication, behaviour, and so on, can be identified. Arguably, education on mobilisation and campaigning, which is missing in the EWC learning pathway, would be highly beneficial for finding appropriate solutions.

In an effort to make the two days a participatory learning experience, the trainer used group, pair and individual tasks to activate the participants. In pairs, the participants analysed the Beckers EWC agreement in view of key elements of the recast Directive. The aim was to find out strengths and weaknesses of their own EWC agreement in comparison to another anonymous but real one. Since the Beckers EWC is a newly-established representation body, the trainer asked the participants to debate, in two groups of four (French speakers/others), what the purpose of their EWC was and what internal rules the members should give themselves in order to become an effective transnational representation body. The results of three groups showed, on the one hand, that the perception of right and wrong human behaviour may diverge considerably. On the other hand, individual opinions may deviate from the collectively negotiated outcomes.

Space of Development (Ort der Entwicklung)

How participant-centred the learning experience becomes is, however, not dependent only on the trainers' facilitation abilities. It depends, also, on how the course participants engage with the learning opportunities provided. This being said, EWC training can open up a space for further development. Whether the course participants indeed tap into this space and use it to advance their knowledge, attitudes and skills, though, is left to their discretion.

The participants' statements indicated that they all gained in terms of knowledge and attitude. Besides confidence, the EWC chair developed, especially, "knowledge of EU trade union structures" (quoted from the survey). One French Select Committee member

⁸⁴ SITUATION: At the plenary meeting of the European Works Council involving the workforce representatives and the group's general management, you witness the following exchange between the Irish workforce representative and the group's human resources manager:

- As the HR manager you must know that the group's Irish subsidiary recently set up a customer call centre serving Ireland and the UK. This call centre is wholly controlled by the group's Irish subsidiary, yet the staff recruited to man it does not enjoy the same conditions as the group's other employees. I should like to point out that the call centre's management body has not recognized the trade unions at this site. What is more it has stated that it has no intention of doing so. Do you think this attitude is compatible with the group's HR policy?

- I must admit being rather surprised by your reaction. I would remind you of the clause in our agreement which states that only matters concerning the interests of employees in at least two of the countries where the group operates can be raised at our meetings. Yet you, it would seem, wish to discuss something that concerns only the Irish employees. I would ask you instead to take up this matter with your local management body upon your return.

TASK: How do you think the other workforce representatives should react to this discussion

- during the meeting;
- at the debriefing meeting?

emphasised, likewise, that her confidence and trust in herself improved. Another French colleague benefited from knowledge on different mentalities in other countries and understanding of diverse human reactions to certain problems. He realised, and very much appreciated, that misunderstandings may occur if one does not consider that what is normal in one country may not be normal in another.

Whether the participants' skills have developed is difficult to evaluate since we do not know how successfully they will apply what they have learned in the future. Nevertheless, remembering the exchange of local policies and practices, the EWC delegates might have developed their skills in finding cross-border commonalities and differences between their subsidiaries. By contrast, the EWC chair (2014, email; survey) expressed feeling somewhat lost defining transnational issues which EWCs can influence. He, furthermore, remained unsure about the legal power and procedures EWCs could utilise to challenge company decisions through the courts because the recast Directive appears too imprecise to be of any help in these matters.

Obviously, the chair's newly gained confidence does not go as far as to allow him to create his own definition of transnational issues. In a multinational company, basically every issue is transnational, as Demaître (2014, interview). Independent of this information, the author had suggested to Gray two weeks earlier to create his own institutions if official ones are of no help. After all this is exactly what management do: they use the discretionary space of laws for their own benefit, and labour is required to react. So why not use management's weapons against them and pro-act instead of re-act? How creative are business leaders in proving why items are *not* transnational?

Ultimately, every participant appears to have gained something from the training. Through everyone's individual development, the EWC members have grown as a group too. Besides increased confidence, they did arrive at "a more integrated approach to common issues" (EWC chair, quoted from the survey). We may also recall the previously mentioned perception that the representative body has become more of a team. Thus, the course participants developed, in addition to transnational personal identity, some transnational collective identity or feeling of cross-border cohesion.

These newly built personal and collective identities not only seem to feel good, but they also have been strengthened: "I am pretty happy with everything during my stay in Brussels", the Swedish delegate (2013, email) wrote one day after the training. He also commented on the conversations he had with the author during breaks and appreciated that "through our discussion, I got some of your energy, enthusiasm and positivism, and that way I will be able to fight on" (ibid). The German colleague took on board the author's suggestion to go to

language classes since he is unable to communicate in the EWC's official language.⁸⁵ "I will improve my English, which will make easier the interaction with each other" (survey, author's translation).

In conclusion, the Beckers case shows that ETUI and EWC training can develop both personal and collective transnational identity. They do so by opening up four fields of education: ideology, cognition, emotion and function. These fields mirror the four basic human elements, which are soul, mind, heart and body.

On the functional field, the participants can shape their personal and collective identities by developing their skills in communicating and networking. They may form their identities through individual and collective traveling, team-playing, problem-solving, identifying transnational issues and win-win solutions. Improving the skill to respond appropriately and in unison to typical situations such as 'whipsawing' games, closure in combination with relocation and wage freeze, profit-sharing schemes, trade union recognition, the use of experts, and so on, addresses participants' collective identity. This is likewise true for exercises which sketch out a more favourable EWC agreement and create rules for effective transnational collaboration.

Regarding emotions, educational activities can be a place to grow high energy feelings like encouragement and enthusiasm, intrinsic motivation, respect and happiness. They can also be a place to release low energies coming from emotional pain such as disrespect, disappointment, dissatisfaction and discomfort. Both personal and collective identity may be strengthened through increased confidence, coherence and trust regarding self and the group. Furthermore, the feeling of improved integration of group members and commonness in approaching tasks can be beneficial for collective identity.

In terms of cognition, participants may gain a better understanding of their roles as individual transnational labour representative, as well as the role of the (national) representative body and movement of which they are members. Both personal and collective identity are shaped, on the one hand, by the trainer through explaining topics like the European legal framework for employee information and consultation (Directive 2002/14 EC), especially the conditions and competencies stipulated. On the other hand, the participants may arrive at a better understanding of their transnational roles by outlining the conditions and competencies regarding information and consultation in their local companies. Eventually, participants can learn how to learn and reflect about self, others and their environment.

⁸⁵ Despite the EWC agreement falls under Swedish law, "the English text version will be the binding text of the agreement" (Beckers EWC agreement, p. 1). Le Douaron highlighted that this might become difficult in front of Swedish judges and legislation in Swedish. How will the English version be translated into Swedish law?

Improvements in ideology can result in an uplifted spirit, determination to fight and increased energy levels. Both personally and collectively, educational activities can create and revitalise purpose and meaning for the representative self and body. Collective identity may, moreover, be formed through establishing and renewing intra-group norms.

ETUI/EWC training can develop social identity along the same four educational fields as human elements. Functionally, the participants' ability to identify cross-border commonalities and differences between their local subsidiaries is sharpened through exercises on cross-cultural communication and social mapping of the company. This involves presenting knowledge on various national legal and cultural policies and practices among Europe concerning employees' representation as well as those affecting the plants at hand. Thus, the participants are encouraged to cultivate empathy, tolerance and respect for workers from other countries. They are also inspired, ideologically, through imagining company colleagues on the European continent. These imaginations can act as a source for purpose, meaning and other normative orientations.

Arguably, social identity building has fallen short in terms of reach. The EWC training touched upon the ETUC member organisations as well as the ETUI, albeit marginally, but it failed to disseminate the idea of a broader European labour movement as well as a link to a broader vision of a more social and democratic Europe. EWC delegates might want to connect functionally, emotionally, cognitively and ideologically with other transnational labour representatives and their workers. These may include other EWCs, World Works Councils (WWCs), European Company Representative Bodies (SERBs), Special Negotiation Bodies (SNBs), Interregional Trade Union Councils (IRTUCs) as well as the European Economic and Social Committee (EESC), to name but a few.

In facilitating such wider connections within the movement, educational activities would enhance labour solidarity not only beyond national borders within a certain multinational company, but also between labour in other companies and countries. This was essentially, yet not exclusively, along transnational supply chains. On top of that, social identity development should reach beyond the labour movement to other movements, social interest groups, companies' consumers, (trans)national citizens and, ultimately, all living beings of this world.

The question of whether ETUI training extends the reach of workers' representatives' social identities and deepens their personal and collective identity in other activities and educational stages needs further investigation.

Given the substantial impact which the author had on two other EWC members through her consultative conversations, the best way to improve the issue of confidence and powerlessness in EWCs are, arguably, one-to-one sessions with a personal and group mentor. So, if there is one thing which the Beckers EWC training proposes in view of what education young EWCs need, it, arguably, is coaching. Ideally, every EWC could avail themselves of a

professional coach not just at the beginning of EWC formation but, rather, along the entire learning pathway.

7.1.2.3. Evaluation

The overall positive Beckers EWC training experience is reflected in the survey respondents' usefulness and quality ratings. Despite having missed some of the legal training, the EWC found the occasion useful. On a scale of 1 (very) to 4 (not at all), all other surveyed colleagues also gave best usefulness ratings. The German delegate expressed, correspondingly, that "the training has given me very much" (quoted from the survey, author's translation). However, what exactly these personal benefits are, he leaves open to interpretation.

Not as unanimous were the participants' opinion on the quality of their training. Probably because they perceived the two days as too short, the German and a French delegate gave this category only a second best marking on a scale between 1 (absolutely delighted) and 5 (very unsatisfied). A French Select Committee member considers the quality of her learning experience to have been "very excellent" (2014, email). The British, Swedish and the other French colleagues agreed with their comrade and gave best quality evaluations, too.

The picture slightly changes, however, when taking separate emails into account. Three weeks after survey participation, the British EWC chair and one French member each downgraded their quality ratings by one. They did so for different reasons, though. The British chair explains his choice by referring to his perceived lack of information on legal power resources. The French colleague contends that "excellent" renders improvement impossible, and there would always be room for improvement. Unfortunately, he offers no suggestions on how to make this improvement (2014, email).

Not only does this issue indicate that different ways of thinking can lead to the same result, but it also points at certain limits of the survey data to reflect the truth. The difference between survey results and follow-up emails prove, moreover, that perceptions may change over time. How accurate, then, are the results of the ETUI evaluation questionnaires which course participants are asked to fill in after every activity?

When comparing the evaluations of the Beckers training event against the general opinions on EWC expressed in the ETUI conference survey, we see that the results are not straightforward. On the same abovementioned scales, a delegate from CGIL in Italy and CCOO in Spain found their learning experience very useful. An official from the French CFTC evaluated his EWC training as useful. The Hungarian colleague from LIGA did not comment on the usefulness, yet he conveyed his extreme dissatisfaction regarding course quality. The CCOO official also sounded unsatisfied in this respect. Contrarily, both the Italian and French delegates were obviously fairly happy with the quality of their EWC training and gave it the second best rating.

Given the quite common opinion about the usefulness of ETUI EWC training, it appears that the contents are considerably useful. Since the perception of quality is divided, the didactics that seemed to suit some may have displeased others. In other words, what ETUI officers and their affiliated EWC trainers deliver appear comparably more appropriate than how they deliver it.

Given such diversity in individual perceptions, it appears difficult for EWC trainers to satisfy every course participant's education needs. Not all grounds for personal dissatisfaction are inside the trainer's circle of control, though, and not all grounds may actually be related to the contents. Maybe the course participant had other expectations of the benefits; maybe he did not feel comfortable in the learning group, disliked the trainer's personality, disliked the food, had a bad day, is generally unsatisfied with himself and his life, etc. All of these human factors may influence the learner's final course evaluation and level of active participation.

Demaître highlights, moreover, that, especially, in EWC-related courses, the nature of participants is often divided between trade union members and non-members. Non-unionised EWC members are often like co-managers who act in businesses' interests, Adrian Hermes, Vice President of the ETUC Youth Committee, maintained at the ETUI EWC Conference 2013.

One underlying reason may be the issue of personal interests. The Beckers EWC chair discovered, in the process of setting up the EWC, that some non-unionised representatives "may feel any antipathy toward management may harm their career prospects" (Gray, 2014, email). Another reason might originate from the fact that non-union members have usually had limited access to labour-inspired education. They may have compensated this by attending courses outside the labour movement. Trainers from private education providers, however, do not always sympathise with workers and may adopt a rather management-friendly perspective. As Gray explains from his experience:

"External trainers tend to give things from a business perspective. For example, I have been on H&S [health & safety] courses both corporate and union, although aiming for the same thing, the union stresses the protection of the workers whereas the other stresses the cost to the company". Companies might therefore try to pre-select the training institution "to give the business agenda" (ibid).

With this in mind, it sounds vital for all labour representatives to take courses from both trade union and private education providers for two reasons. Firstly, a one-sided view shaped through only a labour lens can be avoided.⁸⁶ Therefore, training from a business perspective may enable labour representatives, secondly, to better understand management's points of view as well the company's strengths, weaknesses, opportunities and threats (SWOT-

⁸⁶ Also in science, researchers try, through triangulation and interdisciplinary research, to investigate an issue from different perspectives and opinions.

Analysis). Arguably, labour representatives can represent and negotiate workers' interests best the better they know the employers' interests and underlying motives.

Regarding the motivation to attend the educational activity, Demaître confirms that there, sometimes, are participants who have subscribed to a course more for personal travel interests than for personal development as a transnational workers' representative (see chapter 4). From her own observations at the 'ETUC Annual EWC conference' on 24/25 October 2013 in the ITUH, the author questioned the motivation of many participants. While some fell asleep – one of them even beside the author – another one read his national newspaper.⁸⁷ Many were using their tablets and smartphones on or below the tables in the big auditorium. At the same time, participants were encouraged to Twitter during the conference.

Arguably, such behaviour is not just disrespectful vis á vis the invited experts on the podium. It is, rather, a waste of unions' money and time. This waste of resources appears particularly inappropriate nowadays where trade unions complain about resource shortages. There were, however, also fairly engaged people who contributed to the discussion, sometimes even more than once. The policies, practices and circumstances they reported from back home brought energy into the room.

7.1.2.4. Conclusion

Like the ETUR learning pathway, the EWC framework contains particular knowledge, skills and attitudes which are supposed to make European company-level representatives fit for their cross-border and cross-level roles. Whilst the knowledge section differs considerably from that of the ETUR pathway, the skills and attitudes sections are quite similar. As with ETURs, the emphasis in training lies clearly on knowledge, since this area outweighs the others in amount and detail. Attitudes appear not only the least in number but also in specification. The selection of knowledge, skills and attitudes – i.e., their quality – sounds quite appropriate. However, in all three areas, there is room for improvement in regard to enhancing transnational competence, in particular transformative competence.

Strikingly, the EWC learning path does not provide any knowledge of how labour mobilisation and action is triggered. As we know from mobilisation theory (chapter 2), the key to taking transformative action is the perception of injustice. This perception involves both knowledge and attitudes – respectively, head and heart. The respective attitude might be derived from the trade union values of justice and equality. Trade union values, however, are not specified in either the ETUR or the EWC learning pathway. Equality is mentioned in the 2014/15 course programme; the politisation of (in)justice, the most important trigger of collective action, is not.

⁸⁷ Admittedly, we do not know the real reason for falling asleep. It might be disinterest, it might be the result of being overworked.

Knowledge on special issues like financial data, health and safety, equal opportunities, etc. must not be understood as matters for delegation to SERBs, but rather as opportunities for SERBs to strengthen the power of EWCs. As we saw from the Beckers case, health and safety can be a formidable first topic for new EWCs to build constructive collaboration with management. The common interests between employer and employees in health and safety are quite obvious, so that a labour-friendly agreement might not be too difficult to locate. In general, delegating fundamental issues to the Board level would not only demobilise EWCs but would also reflect corporate structures where decisions are made by a small elite of top managers and Board members without respecting the interests of the mass of workers at the bottom of the hierarchy. The power of labour is not in the Board rooms, though, because workers' representatives are always in the minority there. The power of labour is where they have the majority, and this is at the ground floor. Therefore, transnational topics should stay under the EWCs' authority.

Regarding skills, it sounds incomprehensible that campaign management is reserved for ETURs where EWC members are not encouraged to develop this skill. EWCs can be an excellent space from which joint cross-border campaigns and other actions can arise. Even if EWC members lack resources to manage campaigns, they should at least be prepared, as much as any other trade unionists, to actively participate in campaigns from a local to a global level, as well to act as multipliers in their respective companies. Participation in transnational campaigns as well as any other cross-border activity can enhance representative's attitudes and, eventually, their European (labour) identity. The Beckers case tells us, moreover, that team-building skills are essential from the early stages of an EWC.

With respect to attitudes, developing EWC members' conflict avoidance without conflict management skills seems counterproductive, not only for strengthening the European labour movement, but also for creating transformative change. Whilst avoiding conflicts may sometimes be strategically useful, supranational company representative must also know and be able to seek confrontations with management. This would require confidence and self-efficacy, which new EWC members need to build up, as we can see from the Beckers example. The case reveals, moreover, that strength and the spirit to fight are important for European labour representatives to continue facing managements' often deceitful behaviours.

Review requires, furthermore, an understanding of what knowledge, attitudes and skills are distributed at which maturity stage of EWCs. The Beckers cases indicate that businesses attempt to dictate the agenda for EWC meetings. It, therefore, seems highly inappropriate to encourage proactivity in proposals and innovations only from an advanced maturity stage. Rather, to build a 'countervailing force', knowledge, attitudes and skills for becoming comfortable in the 'driving seat' appear to be vital as early as possible.

7.2. Discussion

The ETUI Education department has created three learning pathways. Two of them are tailored to ETURs and EWCs, respectively. The pathways determine certain knowledge, skills and attitudes which are considered necessary for making European trade union staff and company-level representatives fit for their cross-border and cross-level roles.

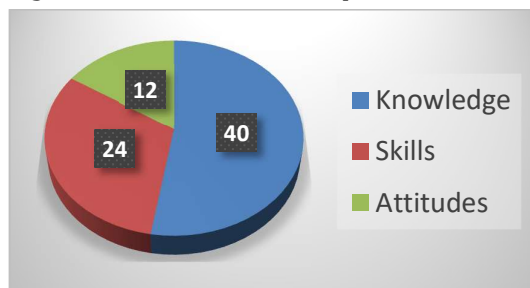
7.2.1. Significance of Transnational Trade Union Education

Given that the ETUI serves European trade union staff as well as national union staff and labour representatives with current and future supranational responsibilities, transnational trade union education is the Institute's daily 'bread and butter'. The ETUI pathways are considered a contribution to lifelong learning. They can also be seen as an element of promoting labour education as a strategic tool for trade unions in Europe to help them achieve their goals from the local to the global level, which is one of the two missions of ETUI Education (see chapter 8). The department's second mission is to develop a European trade union identity along the lines of the EU's motto 'united in diversity', which the pathways' combination of knowledge, attitudes and skills undoubtedly underpin. It remains, however, unclear what impact the low number of yearly participants can make (i.e., whether course participants create a significant multiplier effect).

7.2.2. Education Triangle: Distribution of Knowledge – Attitudes – Skills in ETUI Education

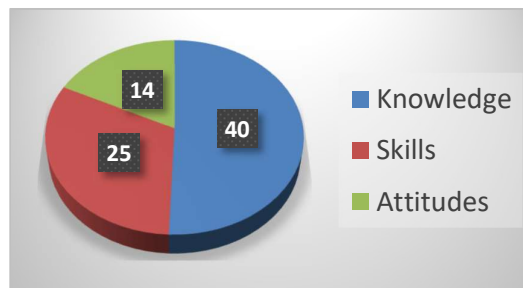
Regarding the distribution of knowledge, attitudes and skills, the quantitative disproportion of both learning pathways is striking. The subjects which supranational delegates are supposed to know amount to 40 for both ETURs and EWCs respectively, which takes at least half of the educational space. Nearly a third of the space is allocated to skills (24 for ETURs and 25 for EWCs). Roughly one third of the amount of knowledge is assigned to attitudes (12 for ETURs and 14 for EWCs) (Figures 7-4 and 5). In other words, there appears a hierarchy of facts, functions and feelings – respectively, head, hand and heart – where learning facts is considered most important. The fact that the education of emotions is not given a deliberate place in ETUI courses but is addressed in between the lines, tends to strengthen this hierarchy.

Figure 7-5: **ETUR Pathway**



Source: own illustration

Figure 7-4: **EWC Pathway**



Source: own illustration

Further supportive of the assumption that the heart element is purposely side-lined whilst the mind is put into the centre of ETUI educational activities is the way that the education triangles are ordered in the documents that present the ETUR and EWC pathways, which is knowledge followed by skills and attitudes. However, this order is neither line with the human body composition (head, heart, hand) nor with Bloom's taxonomy, which the ETUI (2013b) refers to in their guide to effective learning. So, the fundamental structure of the ETUR and EWC learning pathway reflects neither human nature nor the latest official ETUI-ILO education guidelines (ETUI, 2013b).

In order to remove this ETUI internal contradiction, emotions would need to be given a central place in European trade union education. Consequently, workers, their representatives and trade union staff would become more aware of the very part which distinguishes them from robots. The ability to utilise the heart element more consciously would not just bring labour one step closer to humanisation but also closer to practicing true solidarity.

However, it is not only a matter of quantity and structure to evaluate the distribution of knowledge, attitudes and skills, but also of quality. Therefore, the amount of skills and attitudes might be sufficient for what makes effective and efficient supranational labour representatives and union staff, whilst knowledge may not be. In fact, the ETUR and EWC learning pathway supports, strengthens and stimulates transnational labour collaboration only selectively, where a few (but fundamentally hampering) factors seem to prevent the fostering items from reaching its full potential.

Neither the ETUR nor the EWC pathway entails knowledge on mobilisation theory (see chapter 2). Thus, European trade union staff and company-level representatives are not made aware that the key to transformative trade union action is the perception of injustice. This perception requires both knowledge and attitudes, head and heart. The ETUR pathway would, furthermore, benefit from following the EWC pathway and enlarging the currently one-sided focus on understanding the differences and challenges among European labour by understanding, too, the commonalities and opportunities. Concerning the EWC pathway, the suggested 'awareness of the different roles of the individual members at home and in the EWC'

would fit into the knowledge area. The knowledge in both pathways requires alignment with skills, so that ETURs and EWCs can connect issues from the local to the global level instead of stopping at European borders.

Regarding skills, it seems inappropriate that campaign management is taught to ETURs but not EWC members. EWCs can also be a space from which joint cross-border campaigns and other actions arise. Even if EWC members lack resources to manage campaigns, they should at least be prepared to actively participate in the mobilisations that ETURs have organised. Participation in transnational campaigns, as well as any other cross-border activity, can enhance, conversely, representative's attitudes and, eventually, their European (labour) identity.

English has been chosen as common language for both ETURs and EWCs. No other language requirement is mentioned. Whilst the choice for English is arguably very appropriate, it creates a resource imbalance within the labour movement. The comparably few officials from the English-speaking countries have a resource advantage whereas the mass of delegates from all other European countries have a resource disadvantage. Measures to rebalance this disproportion appear desirable for the sake of one trade union value: namely, equality. These measures could also be used as solidarity training. Otherwise, both pathways would maintain discrimination without compensation in view of transnational labour communication. Besides addressing these moral issues, multi-linguism gives a competitive advantage to workers, their representatives and the English-speaking countries they come from.

The ETUI Education department appears, moreover, to have had difficulties clearly defining affective aspects. The list of attitudes of both learning pathways sounds more like a mixture of skills, characteristics and attitudes rather than exclusive ways of thinking. Especially missing is an explicit specification of what, exactly, trade union values across Europe and the world are. Can the national confederations agree to a common set of values and arrive at a common understanding of them? Solidarity, for example, appears to require review in terms of a common definition based on 'emotional reason' (see chapter 2). In order to put mobilisation theory into practice, the concepts of justice and equality also need educational space for theoretical clarification and application. What about democracy, freedom, peace, etc.?

Also questionable is why EWC members are supposed to avoid conflict but shall solve them once they have occurred, whereas ETURs are required to manage conflicts. This difference notwithstanding, doubtful for both groups is whether they are encouraged to actively raise conflict. Inbuilt into the two learning pathways seems, hence, a learned fear of confrontation and rather reactive behaviour as opposed to developing self-confidence and pro-activity, probably for EWCs even more so than for ETURs. Creating behavioural patterns of reaction and avoidance contradicts, on the one hand, the knowledge area where EWCs are envisioned as 'proposing an innovating body'. On the other hand, avoiding conflict is surely a road to

concession bargaining at the expense of workers because representatives may give in to employers' demands too soon for the sake of interpersonal and inter/intra-organisational harmony. The appropriate attitude for both ETURs and EWC members would, rather, be to develop the courage to seek conflict and the persistence to go through them. After all, labour relations are also about class struggle and not only about conflict avoidance.

7.2.3. Transnational Competence Profile

In this section, the ETUR and EWC learning pathways are viewed through the extended framework of Transnational Competence introduced in chapter 4. It assesses the extent to which the two learning pathways foster each of the six sub-competencies – i.e., transformative, analytic, communicative, emotional, creative/imaginative and functional.

7.2.3.1. Analytic

Regarding analytical competence, we can suppose from the knowledge sections as well as the Beckers EWC training that participants are facilitated in understanding the economic, political and social environment/dynamics and actors' strategy/decision-making in the home country and abroad. Ecologic concerns are covered through the pathways' reference to sustainability. Contexts which are both internal and external to companies as well as trade unions are possibly included in the previous points. However, critical reflection (see chapter 3) on what is internal and external to self is not explicitly mentioned. As suggested before, knowledge on mobilisation theory would add value to analytic competence.

As also noted earlier, commonalities and differences remain more a matter for EWC training, whilst ETURs seem to be made familiar with the differences only. Both European trade union staff and company-level representatives appear to be supported through knowledge, skills and attitudes in adopting a deep/multi-level (vertical), broad (horizontal) and holistic (connected) perspective along a certain time line (past, present, long/short-term future). Whether bridges between individual and collective concerns are made is difficult to evaluate. More obvious is the facilitation to connect cognitively (but not functionally) local/national events with wider global struggles, since knowledge (but no skills) on the international trade union movement and global institutions is provided. Going beyond 'bread and butter' issues appears more attached to EWCs than ETURs, with the former envisioned as 'proposing and innovating body'.

7.2.3.1. Creative/Imaginative

Both pathways include 'initiative and innovation' as a required skill, which addresses the creative/imaginative competence. Innovative encouragement to link labour issues across levels would be a feature of New Labour Internationalism (chapter 2). In both pathways, however, the links are supposed to finish in Europe (instead of using the knowledge on the global level to connect further to the international trade union level). Likewise unsure seems how utopian/boundless the imagination is which participants are encouraged to build regarding the worlds inside and outside labour. Trade union renewal is noted in the ETUR pathway, but it is not in the one for EWCs. Whether both pathways lead to a new conception of man, life, education, work, civilisation, ecology, and, as part of it, workers and the wider society as a 'community of fate' (see chapter 2) seems difficult to tell. The word 'alternative' can be found in the ETUR pathway, but not in the EWC.

7.2.3.2. Communicative

Both learning pathways refer to the communicative competence. Communication and interaction skills include active listening and information sharing. Facilitation of open and honest dialogue can, hence, be assumed. The Beckers case confirms that dialogue between the EWC members is, indeed, stimulated. Since instinct and intuition are mentioned in regard to other skills, it seems doubtful that ETURs and EWC members learn to communicate with all six senses. Negotiation is on the learning agenda, too. Both ETUR and EWC members are supported in improving their English and French. The latter is much less in demand than English, though (see chapter 6). The specialist terms relevant for talking to different target groups, such as European institutions, corporations, trade unions, union members, etc., is caught up rather implicitly during the educational activities.

7.2.3.3. Functional

In both the ETUR and EWC learning pathways, research skills, reporting and information exchange are explicitly noted. Given the knowledge of actors which the pathways propose, cross-border networking seems encouraged for different people inside the labour movement up to European level vertically instead of globally. Whether contacts outside the labour movement are highlighted is difficult to evaluate. A closer look into the contents of ETUI educational activities could also reveal whether knowledge on strong, weak and moderate ties is distributed.

The Beckers case shows that the ability to build a team, network and develop a coordinated response to management can be facilitated. Indeed, both pathways refer to people management through cross-cultural skills as well as team building and working. Project elaboration and management is addressed, too. The ETUI core Project Management

educational area includes education on EU funding (structural funds, health and safety). Given the supranational responsibilities of ETURs and EWC members, projects can be expected to be transnational.

As mentioned above, conflict management seems rather reserved for ETURs, where EWC members are encouraged to avoid them, but obviously solve them once they have occurred. Whether participants are also encouraged to improve labour-internal-resources is uncertain, but it might come under the heading of initiative and innovation skills. As noted earlier, whilst the decision to promote English as a common language among labour is certainly useful, it is likely to create a cross-border imbalance of linguistic resources. Both ETURs and EWC members shall be able to anticipate and manage changes. They seem not facilitated much in bringing about change, though. Leadership skills are distinguished between collaborative (ETURs) and integrative/participative (EWCs) which are both team-oriented.

7.2.3.4. Emotional

ETURs and EWC members are taught to adopt an open and flexible mind – but, what for? For reforming or transforming? How much participants overcome their fears, leave their comfort zones, break personal/organisational/structural barriers and are flexible in their behaviour is certainly a matter of how much they tap into the 'space of development'. The Beckers case indicates that participants gain some confidence from ETUI educational activities, both individually as labour representatives and collectively as a body. Confidence is the first step towards leaving the comfort zone and breaking barriers.

Curiosity and comfortability with meeting the unpredictable/unknown does not appear on the pathways' list of attitudes. Arguably, acknowledging diversity does not necessarily include embracing it, and the focus on enabling EWC members to avoid conflicts would neither support them meeting the unknown nor in becoming courageous and confident risk takers and fighters. Pro-activity and the commitment to transnational labour solidarity appears facilitated through the attitude of sharing and delegating competencies to build Social Europe (ETURs) and a common transnational body (EWCs) as well as to strengthen trade unions, the ETUC (ETURs) and the ETUFs (EWCs). EWCs are, furthermore, stimulated to looking for a common systematic approach to working on topics. The attitude to lifelong and mutual learning is not explicitly mentioned, but it seems, rather, expected to arise from common actions. Whilst tolerance and respect are, certainly, ingredients for constructive human relations, they point more to professional distance than to empathy and compassion for sisters and brothers.

7.2.3.5. *Transformative*

The ideology of social democracy can be found in ETUR's knowledge on the European Union and its current (im)balance between democracy and markets. No reference is visible for EWC training. The broader vision of social justice, however, is absent in both pathways. This is not surprising, given that knowledge of mobilisation theory and the importance of injustice is not covered. Human equity is touched upon through knowledge on equality as a special issue for ETURs, as are equal opportunities and social minimum standards (IFAs, OECD guidelines, etc.) for EWCs. Under the conditions that equality, equal opportunities and social minimum standards are theoretically installed and enforced in practice, these topics could contribute to transformative competence and empower workers' position vis á vis management and free employees from competing unfairly and unnecessarily against each other. Ecologic sustainability is a matter for both ETURs and EWCs. Whether participants are made aware that even sustainable growth must end at some stage remains questionable.

Whether participants are encouraged to liberate themselves from both oppressors and oppressed at all levels and emancipate themselves towards humanisation and happiness seems doubtful. As stated earlier, both ETURs and EWC members are not facilitated in connecting with international labour, despite their knowledge on this level. Humanisation and emancipation are never noted. This does not surprise given that the ETUI's pedagogical approach of social constructivism would not include such radical vocabulary. Autonomy is mentioned, but only in terms of working skills. Suggesting that EWCs avoid conflicts would lead neither to emancipation nor to critical consciousness.

Critical consciousness and wisdom can be developed through instinct and intuition, which can be detected among skills. The 'sixth sense' is tied to research, analytical skills and assessing skills instead of using it as a transferable skill for general decision-making. Moreover, the skill to utilise intuition deserves more attention. Most questionable is whether ETURs and EWC members are fostered in rekindling the utopian vision of international solidarity and creating a higher spirit of transnational unity. Trade union values are not specified in either pathway. Any reference to 'imagined community' or 'community of fate' (see chapter 2) is missing in respect to creative/imaginative competence. Trade union renewal is a special knowledge issue for ETURs, but is not anticipated for EWCs.

Moreover, difficult to evaluate is whether ETURs and EWC members are supported in favouring more long-term (r)evolution than short-term gains. Equal opportunities, ecologic sustainability, social minimum standards, linking trade union levels, strengthening trade unions, ETUC and ETUFs as well as patience and resilience certainly point to long-term thinking. However, these are just a few areas compared to the numerous other items on the two learning pathways.

Conclusion

The question of to what extent the ETUR and EWC learning pathways foster participants' transnational competence cannot be answered straightforwardly. Rather, the picture is mixed. On a positive note, both learning pathways touch upon all six competencies which form the concept of Transnational Competence. However, some competencies are more addressed than others. Analytic, communicative and functional competence appear covered most. Creativity and imagination seem to fall short in reach and depth, whilst emotional abilities appear too weak to creating the power, passion and empathy needed for cross-border solidarity action. Least nurtured is transformative competence. Both pathways stimulate transformative competence nearly exclusively in the knowledge section, even if transformative knowledge on mobilisation theory and the importance of injustice, as the key trigger for collective action, is missing. The few skills involving initiative, innovation, and intuition would certainly foster transformation. The attitudes, however, appear too defensive, not only for participating in class struggle, but also for motivating participants to push for transformative change of themselves as union staff/representatives, their organisations/bodies as well as their circumstances.

Due to the emphasis on head and hand, it seems unlikely that the two ETUI learning pathways can facilitate the workers of Europe and the world in uniting through their hearts and souls, as labour had done up to the early past century. Yet, more detail on the course contents which make up the learning pathways would be needed to support or disprove this result. It seems indisputable, nevertheless, that room for improvement involves harmonising the education triangle of the ETUR and EWC pathway through adding knowledge, attitudes and skills which are essential for transformative transnational labour collaboration and trade union renewal.

The reasons for the mixed impact of ETUI education for ETURs and EWCs on enhancing transnational competencies may be found in the organisational and personal factors that were outlined in chapter 3 and 6. One example is reflected by the ETUFs and ETUI officers. The Federations basically do not care about the ETUR pathway. Instead, they continue to create their own learning processes through one or two seminars per year which the ETUI Education department organises for and with them. Although the ETUI officers cannot force the ETUFs down their well-intentioned route, they try to influence the decision-making on topics, more or less successfully. One might, therefore, argue that the ETUI has, so far, partly failed in its mission to promote education as a strategic tool for the European labour movement.

Contrary to the ETUR path, the introduction of the EWC parcours marked the beginning of structural reforms. Even if quite late compared to the EWC Directive, the more organic structures of ETUI Education are now in the process of becoming a more standardised and transparent reference for all other 16 EWC trainers with whom the ETUI collaborates. Here

too, however, it is ultimately the EWC members and their Federation coordinator – if there is one at all – who can dictate the contents and style of the educational activity. If the Education officers' proposal does not meet the service users' expectations, the EWC coordinator may choose from alternative players on the EWC training market (see chapter 6).

Meanwhile, the number of EWC trainings has been rising continuously since 2007. The EWC trainees must have been fairly happy with their ETUI learning experience overall. This assumption is underpinned empirically by the Beckers case.

The national confederations, however, are less unanimous on the quality of ETUI EWC/SERB/SNB training. Maybe they have a different understanding of trade union education? Maybe they have different organisational prerequisites? Maybe they have different individual training needs? We, obviously, need more data in order to assess the disagreements between ETUI Education and the national confederations as well as their agreements regarding trade union education. Thus, the following chapters (8 and 9) provide data on the cases of Germany and Ireland. Equal to chapters on the European level, the chapters on trade union education in Germany and Ireland will apply the framework of Transnational Competence (chapter 4) and assess the programmes' ability to foster labour representatives' six transnational competencies.

PART III – TRADE UNION EDUCATION AT EUROPEAN LEVEL

Conclusion

Part III investigated the trade union education offered by the leading educational institution at the European level – i.e., the ETUI. Transnational trade union education is the ‘bread and butter’ of the ETUI Education department. The first chapter (6) of this part analyses the Department’s course programme and planning as well as its challenges to transnational trade union education. The second chapter (7) concentrates on two particular and structured educational areas: namely, the learning pathway for European Trade Union Representatives (ETURs) and the pathway for European Works Councils (EWCs), European Company Representative Bodies (SERBs) and Special Negotiating Bodies (SNBs). Central to the analysis was an assessment of the pathways’ ability to foster Transnational Competence (TC) (chapter 4).

Every year, approximately 2,000 labour representatives and trade union officials participate in ETUI’s educational activities. Considering the 45 million workers in Europe which the ETUC represents, it appears questionable whether ETUI Education can ‘support, strengthen and stimulate’ the European labour movement significantly. Moreover, the educational activities of the ETUI are not designed to facilitate workers and their agents in transforming themselves, their organisations and the wider economic, political and social structures. The department has not adopted a critical-emancipatory approach to education, but it follows social constructivism, which originates from the progressivist educational philosophy. Regarding EWC/SERB/SNB training, the Department’s resources are less than meeting what the demand would require. Collaboration with the national union organisations is challenging because the national educational structures, organisations and persons are not easily connected to the European level. However, the ETUI is eager to improve its partnerships with the national level. As we will see in the following part, collaboration with German trade unions has increased recently.

One difference may be the understanding of trade union education. ETUI Education follows the education triangle of knowledge, attitudes and skills, as the ETUR and EWC learning pathways show. However, the department seems to have created a hierarchy instead of balance between these three areas, where knowledge is emphasised most and attitudes least. Flaws in the contents of the three educational areas limit the extent to which transnational competence is developed. On a positive note, all six competencies are addressed, albeit to varying degrees. The transnational emotional and transformative competencies are addressed least, whilst the analytic is covered most. Creativity and imagination seem to fall short in reach and depth, whereas communicative and functional competence appear considerably more important.

In order to compare trade union education at the European level with transnational trade union education at the national level, we need data from the national level. Therefore, the following part examines what educational activities trade unions in Germany and Ireland offer in order to foster labour representatives' transnational competencies and what barriers are present to them doing so.

PART IV – TRANSNATIONAL TRADE UNION EDUCATION IN TWO DIFFERENT NATIONAL CONTEXTS

The overarching question which drives this research project is ‘to what extent does trade union education in Ireland, Germany and at the EU level foster labour representatives’ transnational competencies and what are major challenges to achieving that?’ The previous part examined how trade unions at the European level educate labour representatives in Transnational Competence (chapter 4). In this part, we look at trade union education at the national level – that is, how Irish and German trade unions develop delegates’ transnational competencies.

As a matter of limited scope, the focus is on transnational educational activities for lay labour representatives (Ehrenamtliche) in the companies – i.e., work/staff council members (Germany), shop stewards (Ireland), as well as representatives for health and safety, youth, equality, etc. Further education for trade union officials (Hauptamtliche) is touched upon only selectively.

Usually based in Dublin, the author spent about 3 months in Germany collecting data through expert interviews, document analysis and (non-)participant observations. The basis for analysis is mostly trade unions’ 2015 course programmes, but it also includes their educational activities since the mid-1990s, if applicable. This data allows insight into the policies and practices of trade union education in Ireland and Germany.

Exemplary for trade union education in Germany (chapter 6) are the national confederation DGB (Deutscher Gewerkschaftsbund); or, more exactly, its educational centre at the federal level, which is the DGB Bildungswerk BUND (DGB BW). The educational centre’s local activities in the Bezirke are not considered due to constraint of space. The sectoral level is represented by the two biggest affiliates of eight total DGB member organisations, i.e. the German Metal Workers’ Union (IG Metall, IGM) and the United Services Union (Verdi).⁸⁸ In 2014, IGM had 2,269,281 members whilst Verdi counted 2,039,931 (Statista, 2014). Both affiliates account for 70.8% of total DGB membership (6,104,851) (ibid) and are, hence, likely to represent well the labour political landscape in Germany.

Verdi was founded through a merger in 2001. The union has adopted a complicated and resource-demanding matrix-structure around their 13 sectors (Fachbereiche)⁸⁹ (Michelbrink,

⁸⁸ The other six DGB affiliates and their membership in 2014 are: IG Bergbau, Chemie, Energie (Mining, Chemicals and Energy Trade Union, 657,752), IG Bauen, Agrar, Umwelt (Building, Agriculture, Environment Trade Union, 280,926), Gewerkschaft Erziehung und Wissenschaft (Education and Science Trade Union, 272,309), Gewerkschaft Nahrung, Genuss, Gaststätten (Food, Beverages, Catering Trade Union, 205,908), Eisenbahn- und Verkehrsgewerkschaft (Railway and Transport Union, 203,875), Gewerkschaft der Polizei (Police Trade Union, 174,869) (Statista, 2014).

⁸⁹ The sectors 1 to 13 are: Financial Services; Supply and Waste Management; Health, Social Services, Welfare and Churches; Social Insurances; Education, Science and Research; Federal States and Länder; Municipalities; Media, Arts and Industry; Telecommunication, IT, Data handling; Mail Services, Shipping and Logistics; Transport; Trade; Special Services.

2015, interview).⁹⁰ Altogether, the union represents about 1,300 professions in the public and private sector (ibid). Unlike in the metal industry, the union's private sector is characterised by rather small enterprises where many workers are in precarious and low-paid conditions, such as private health personnel, kindergarden staff, hairdressers, etc. (ibid). Of members, 51% are female.⁹¹

IGM was joined by the textile and garment workers' union (GTB) in 1998 and the wood and plastics workers' union (GHK) in 2000. Unlike Verdi's private service sector members, workers in the manufacturing industry are more securely employed by bigger, multinational companies, and they are majorly male (Michelbrink, 2015, interview). Due to the higher number of MNCs, the manufacturing sector includes more multinational companies and is, hence, more internationally oriented through exports than the public and private service industry. As a consequence, the amount of EWCs is considerably higher in manufacturing than in services.⁹² Therefore, IGM's engagement in transnational trade union education is likely to be higher than Verdi's.

This assumption is underpinned by the fact that IGM is Germany's biggest provider of trade union education. With up to 90,000 participants per year, the union trains and educates around 45% of participants in labour educational activities provided by trade unions.⁹³ It follows that roughly 200,000 people (3.3% of total DGB membership) participate in German trade union education every year. Both IGM and Verdi use trade union education as an organising tool.

The choice to complement the analysis of DGB's education policies by an analysis of trade union education offered by Verdi and IGM is due to two reasons: firstly, sectoral unions have gained more and more power in the German trade union movement, and they are the centre of collective bargaining. At the same time, the power of the DGB has been declining to a political 'lobbying' actor (Keller & Kirsch, 2011). The increase in the sectoral power of Verdi and IGM can be explained through the above-mentioned fusions. Secondly, sectoral differences regarding transnational trade union education may be as important as national differences. For instance, the difference between the Irish and German public sectors can be smaller/bigger or equal to the differences between the public sector and the manufacturing industry in Germany. More generally, differences in the same sector between two or more countries can be as decisive as differences in different sectors within one country. As we will see, the difference of engagement between Verdi and IGM is not as straightforward as the sectoral disparities would suggest.

⁹⁰ Michelbrink (2015, interview, author's translation) perceives the dilemma of the matrix structure in the fact that it presupposes "good communication between human beings". Good communication between people would not be the case in Verdi. Therefore, areas of educational intersections are either duplicated or not done at all.

⁹¹ Michelbrink (2014), Politische Bildung von Arbeitnehmerorganisationen, pp. 13, unpublished.

⁹² <http://www.worker-participation.eu/European-Works-Councils/Facts-Figures>, accessed 30 August 2015.

⁹³ Michelbrink (2014), Politische Bildung von Arbeitnehmerorganisationen, pp. 13, unpublished.

Exemplary for trade union education in Ireland (chapter 9) are, likewise, the national confederation ICTU (Irish Congress of Trade Unions) and the five biggest of 48 affiliates, which are SIPTU (Services Industrial Professional Technical Union), IMPACT (Irish Municipal Public and Civil Trade Union), Mandate (the Union of Retail, Bar and Administrative Workers), TEEU (Technical Engineering and Electrical Union) and UNITE. UNITE is a transnational case as such because the union organises in the UK, Northern Ireland (NI) and the Republic of Ireland (ROI). Similarly, ICTU has members in both NI and the ROI. The five affiliates account for 63.9% of ICTU membership in the ROI.

The structure of this German and Irish sub-chapter is three-fold. The first section looks into the kind of adult education which is prominent in the respective country. As opposed to *Community Education* in Ireland, Germany has a history of *Political Education*.

The second part analyses the educational activities which the abovementioned trade unions offer. Particular attention is paid to activities with a transnational concern and their ability to develop participants' six transnational competencies. Moreover, corresponding to the analysis of the two ETUI learning pathways (chapter 7), the share of knowledge, attitudes and skills in national trade union education is investigated. Like the previous part on trade union education at EU level, the present part attempts, thirdly, to uncover the challenges which may foster and hamper German and Irish trade unions to integrate the concept of Transnational Competence (TC) (chapter 4) in their educational activities. Applying the analytical framework of part II, the factors that are revealed in both countries include the *understanding of trade union education*, the *pedagogical approach*, *resources* (human, material and socio-organisational, in addition to moral resources in Ireland) as well as *people* (union leaders, participants and competitors in Germany, respectively the individual commitment and participants in Ireland).

Subsequent to the overview of (transnational) educational activities in Germany and Ireland and their ability to foster representatives' transnational competencies, the last section explores the engagement of the respective national trade unions in EWC training. Analysing EWC training activities is important because they are an indicator for German and Irish unions' commitment to transnational labour collaboration. EWCs can be an epicentre of cross-border action, and their members require transnational knowledge, attitudes and skills for fulfilling their representative roles. Moreover, trade unions in both countries have the same supranational legal preconditions, as they can utilise the right for educational leave and training costs paid by employers on the basis of the EU's recast directive. Analysing EWC training in Germany and Ireland also allows a comparison to the ETUI, where EWC training is a core business.

As we will see, the educational core business of trade unions in Germany and Ireland is to facilitate labour representatives locally in their day-to-day work in the companies. Irish trade

unions do so through a relatively small number of courses, and they pay very little attention to cross-border concerns. Consequently, labour representatives' transnational competence development is almost absent.

German trade unions offer an impressive amount of educational activities and dedicate a considerably bigger space than their Irish comrades to European and global issues. DGB BW provides approximately twice as much transnational educational space as its sectoral affiliates. This is probably due to the fact that the DGB has agreed with its affiliates to stay away from the company level beyond their traditional programme for labour representatives. In comparison to the unions' overall course programmes, however, the share of transnational educational space is fairly minor.

As a result, education in view of Transnational Competence (chapter 4) is lacking in Ireland and has substantial room for improvement in Germany, particularly in terms of emotional, creative-imaginative and transformative competence.

8. Chapter: Trade Union Education in Germany

The early stages of labour's rising in the 19th century were sustained by workers' desire to know more about their situation and interests, economically, politically and socially. The purpose of labour education was, therefore, driven from the grass roots and has had an individual and collective nature.

In the following decades, the individual desire for enlightenment fell more and more prey to the institutionalisation of labour representation through trade unions and work councils.⁹⁴ Should trade union education serve to build the unions' capacity to fight for collective interests or should it also serve the individual workers' development? The answer to this question has been controversially discussed at least since the beginning of the 20th century, and it has tended to clearly favour union organisation. Back then, trade unions as well as some academics feared that emancipated workers would be able to leave the working class and betray their former brothers and sisters (Brombach, 2014). From this position, workers had better always stay workers, apparently as if they might still feel in solidarity with the working class and use their greater power to empower the less powerful.

Oskar Negt (1974) and his idea of Sociological Phantasy and Exemplary Learning, published first in 1968, was an attempt to break with Weimar Republic traditions and go beyond the classical cadre training in the service of the union organisation (Funktionärsschulung). In memory of the early days of labour, trade union education should have a wider purpose and

⁹⁴ Works councils were institutionalised in Germany through the Betriebsrätegesetz in 1920. The Works Councils' Act is the predecessor of the Works Constitution Act which was introduced in 1952 and had been amended several times thereafter.

be oriented, most of all, to the workers, he argued. Further, trade union education shall be a means to develop class consciousness as the basis for solidarity and strike actions. Whilst class consciousness affects both trade union staff and members, it is the latter who eventually fill with life the protest events that trade union staff organises. Negt's approach to critical labour education is seen by the DGB Deputy General Secretary as "the classic of political education and labour education" in Germany and "exceptionally powerful" (Brombach, 2014; also Kubik, 2015, interview).

The debate about the purpose of trade union education reflected itself in a discussion about pedagogical approaches to youth labour pedagogy in the 1980s (Hannack, 2014; Johannson, 1981). The 'Leitfadenansatz' was opposed to the 'Erfahrungsansatz'. Both approaches have the same goal: namely, to develop insights into social, political, economic and ecologic connections from which people take action for change. Their way to achieve this goal is different, though.⁹⁵ Johannson (1981) argues that, in praxis, it may be necessary to guide the learner in how to build the bridge from individual and collective experiences to certain insights. Therefore, the Leitfadenansatz might not be as indoctrinating and outdated as it is accused by its opponents of being.

In 1990, the Hattinger Circle of 18 labour-friendly academics published a provocative report "Jenseits der Beschlusslage. Gewerkschaft als Zukunftswerkstatt" (Beyond resolutions – Trade union as Future Lab) that added fuel to the fire of the discussions about the contents and methods in trade union education and its purpose (see Mückenberger & Schmidt, 2011).⁹⁶ Should seminars portray only trade union decisions or also support members' personal development? Are educational activities agents of union Boards or are they a means to develop "mündige Streiker" (autonomous strikers)? Do trade unions see themselves as "Tarifmaschine" (collective bargaining machines) and, therefore, focus their education on improving the power of works councils? And/or do trade unions see themselves as part of a social movement and, hence, invest in political education to help develop a more democratic and critical society (Gehrke, 2015, interview)? Oskar Negt, Ulrich Mückenberger, Rainer Zoll and other contributors proposed nothing less than a paradigm change away from the predominantly functional view of trade union education (Molitor, 2010).

In the following sections of this chapter, we will see whether this attempt to create a broader social mandate for trade union education has also succeeded in advancing

⁹⁵ 'Leitfadenansatz' may be compared with Freire's concept of 'banking system' where the learner is seen as object that follows the teacher's standardised and predefined learning path. Freire's 'problem-posing education' as well as Negt's exemplary learning are examples of 'Erfahrungsansatz'. Here, the learners are considered as subjects who are facilitated by the teacher to create their own learning path and gain insights through the course participants' different experiences.

⁹⁶ The research project was sponsored majorly by the Hans-Böckler-Foundation under the then HBS research funding manager Reiner Hoffmann – who is now the president of the DGB – and the HBS chairwoman, Ilse Brusis.

transnational labour collaboration. The sections, therefore, assess the trade union education structures, resources and relations of the DGB, Verdi and IG Metall.

8.1. Politische Bildung in Germany

8.1.1. The Concept of Bildung

'Bildung' is a concept originating from the theological sphere in medieval Germany (Masschelein & Ricken, 2010). Bildung is translated in other languages as 'education' and 'formation'. 'Bild' actually means picture or image. But, does the learner become an image of something? Does the learner create a picture of something? Does the teacher or any other power mould the learner according to a certain image? The suffix 'ung' makes a noun of a verb (nominalisation), which here is the intransitive verb 'sich bilden' (to educate/construct oneself). Sich bilden is related to 'sich herausbilden' (to evolve/develop/emerge) and 'Gestalt annehmen' (to adopt a form/shape). Etymologically, we can see some meaning connection to the Latin verbs 'educare' (train, mould), 'educere' (lead out) and 'educere' (bring out, develop) (see chapter 3). With this in mind, Bildung and Herausbildung is, arguably, a process that can happen both consciously and unconsciously.

The understanding of Bildung and its equivalents in other countries has changed over the centuries from ancient Greek (paideia) to transformative ideas along the educational philosophies (see chapter 3). The humanist-inspired reformist Wilhelm von Humboldt (1767-1835) may be seen as the godfather of today's German educational system. During his 16-month period as Prussian Minister of Education and Arts in 1809-10, he structured the educational system towards what competencies school graduates require for successfully integrating into society and the economy. Above all, graduates would need to learn how to learn (Friedmann & Wiegrefe, 2009).

Revolutionary, as yesterday so today, are Humboldt's demands for education for all and relevance for life (ibid). His idea of 'allgemeine Menschenbildung' (general human education) describes the eternal way to find oneself, to find what it means to be human; and this means learning beyond institutional, professional or any other man-made constraints (Detjen, 2013).

Central for this process, which Freire (1973, 2002) calls 'humanisation', are two things that Bildung is supposed to develop, namely competence and morals (Kompetenz und Sittlichkeit) (Friedmann & Wiegrefe, 2009). As Masschelein and Ricken (2010: 129) put it, "Bildung refers as much to the process in which the individual acquires his form (individual self-production) as to the product of the process which forms soul and spirit (spiritual self-formation)" (author's translation). Taken together, what is meant is the competence to live life independently and behave according to certain human-friendly norms (Friedmann & Wiegrefe, 2009).

Besides general education, Humboldt considered political education vital for facilitating political participation and achieving humanisation. He envisioned the nation as a community

of educated citizens who are able to shape public affairs (Friedmann & Wiegrefe, 2009). Political education would enable people to participate in political decision-making. The ability to participate in political matters is not only essential for developing autonomy but is also an expression of it. The more politically educated people are, the better they can realise and pursue their interests and represent them in public. Political education, therefore, teaches citizens too that, first and foremost, everyone is responsible for their own destiny (Thon, 2013).

As a result, Humboldt's notion of *Bildung* is rather individualistic, yet with a concern for a democratic community. It is also holistic, as it involves all four human elements: i.e., body and mind (competence), heart and soul (morals). Moreover, Humboldt promotes lifelong learning, pro-activity, respect and peace concerning self and others. However, there has been no time in German history where Humboldt's ideas were fully translated into the educational system (Friedmann & Wiegrefe, 2009).

8.1.2. Politische Bildung (Political Education): History and Institutional Background

Political education in German schools may be traced back to the 16th century. At the end of the 19th century, the subject gained new impetus as nation states were created and the people were required to learn their new roles as citizens, as opposed to remaining subordinates. Hence, political education may also be called civic or citizenship education. The early activities, however, were more dictatorial indoctrination than democratic education (Sander, 2009).

Modern political education in Germany may be seen as a post-war gift from the allied powers. Especially, the US was determined to extinguish Nazi ideology and 'civilise' Germany. They were eager to re-educate ('umerziehen') the German people by exchanging racist and militarist thinking and doing for civic responsibility and a democratic lifestyle. As a consequence, political education in view of (capitalist) democratic participation was introduced as an educational principle in the schools of Western Germany, particularly in history and geography classes. Political education in East-Germany, by contrast, was geared towards Soviet communist ideology and practice.

Despite this difference in content, post-war political education in Germany received its first legal framework through the Standing Conference of the Ministers of Education and Cultural Affairs on 15 June 1950 (Detjen, 2013; Hufer, 2013). The second relevant framework was the Beutelsbacher Konsens (1976), which provided three basic principles for political education: rule of controversy (*Kontroversitätsgebot*), ban of indoctrination (*Indoktrinationsverbot*) and participant orientation (*Adressatenorientierung*) (Kalina, 2014; Widmaier, 2012).⁹⁷ In addition,

⁹⁷ Rule of controversy: controversies between political and academic viewpoints are to be sketched out in class; Ban of indoctrination: presenting one-sided opinions and arguments must be avoided; Participant orientation, which is neglected most, means to enable learners to realise their own interests and influence politics towards them (Sander, 2009; Widmaier, 2012).

the DGB achieved – after heated discussions with the employer representation – a third statutory underpinning of political education, paid educational leave (Hufer, 2013).

Thus, as opposed to Ireland, Germany is one of 35 countries in the world that has ratified ILO Convention 140 (1976, paid educational leave).⁹⁸ The transposition into the *Bildungsurlaubsgesetz* (BiUrlG) has remained limited, however, because the right for further education during working hours has never been introduced at the federal level. Two states, Bavaria and Saxony, do not have such legislation at all. Baden-Württemberg and Thuringia passed a law in March 2015 to introduce it. The former chose the title 'Bildungszeit' (educational time) instead of 'Bildungsurlaub' (educational leave).⁹⁹ Interestingly, Article 2 ILO Convention 140 refers – besides to general, social and civic education – explicitly to trade union education as a reason for paid educational leave.

8.1.2.1. Political Aims and Competencies

The overarching goal of political education is to ensure the stability of democracy (Späte, 2013). Stability requires citizens to be close to and trust in the democratic form of society as well its governing institutions, procedures and representatives. It also demands that people let the values of human dignity, freedom, justice, equality, solidarity, peace, stability (Schiele, 2013) and sustainability (Probst, 2013) guide their actions. As an integral part of lifelong learning, political education has, thus, been described as 'marketing for democracy' (Kalina, 2014) and the 'life elixir of democratic societies' (Thon, 2013).

Vital to a stable democracy is that people participate in it. For so doing, citizens are required to have certain competencies. Detjen, Massing, Richter and Weißeno (2012) suggest a model of four mutually influencing competencies which, together, form 'Politikkompetenz', which comprises political attitude and motivation (politische Einstellung und Motivation), expert knowledge (Fachwissen), political action (politische Handlungsfähigkeit) and political opinion (politische Urteilsfähigkeit) (see also Massing, 2012). Negt (2010) would equip a 'homo politicus' with six key competencies, which are identity, justice, technology, ecology, economy and history. Kalina (2014) points, additionall, to media and intercultural competence as well as to reflectivity. Arguably, Negt and Kalina can be subsumed easily into Detjen and colleagues' model.

⁹⁸ Other countries in Europe are Belgium, Czech Republic, Finland, France, Hungary, Netherlands, Poland, San Marino, Serbia, Slovakia, Slovenia, Spain, Sweden, Macedonia, Ukraine, and UK.

⁹⁹ Likewise, a debate in Verdi has arisen about renaming 'Bildungsurlaub' (literally: educational holiday) into 'Bildungszeit' (educational time). Why? On the one hand, the word 'holiday' has a negative connotation for employers. On the other hand, (potential) members would reckon that they cannot take leave for education. Hence, Verdi Marketing would suggest changing the name in order to attract new members. For the GBP executive director, this debate is absurd. He would rather like to change back to the original positive meaning of educational leave. For Michelbrink (2015, interview), in fact, educational leave has a double positive meaning through education plus holiday/leave.

Whatever the competencies' names, their ultimate aim is to develop citizens' political maturity (Mündigkeit) (Detjen, 2013; Späte, 2013). Mündigkeit stems from the word 'Mund' (mouth) and means to open one's mouth and voice agreement and disagreement (Grass, 2009). This ability requires conscious thinking and feeling as well as autonomous decision-making. Mündigkeit is a precondition to challenging, resisting and transforming the institutionalised injustices in allegedly democratic societies.

Since democracy is about appreciating and reconciling multiple views, paramount to democratic political maturity is learning to be comfortable not only with consensus and conflict, but also with tolerance and criticism (Kalina, 2014). Opposed to the idea of freedom, democratic political maturity means voluntarily submitting oneself to the rule of democratic institutions. Otherwise put, as much as people may create democracy, they enslave themselves to it.

8.1.2.2. Providers and Participants

Political maturity can be developed through state agencies. German formal and, hence, mandatory political education is provided in schools and in vocational education. Significantly involved are the Federal Agency for Political Education (bpb) and the centres for political education of the Länder. Non-formal and therefore voluntary political education is available to basically all ages. The main providers here are non-governmental bodies, in particular the party-affiliated foundations, people's high schools (Volkshochschule), trade unions, non-for-profit associations like the DGB-related agency 'Arbeit und Leben' (Work and Life), churches, etc. (Detjen, 2013; Hufer, 2013; Kalina, 2014).

Correspondingly, state support is increasingly given for projects as opposed to overall maintenance of political education. Besides recent changes in the conditions of support, there is a tendency to restrict it. The political marginalisation of political education indicates the increasing marketisation of education in general (Kalina, 2014). The focus on competence and performance signals, likewise, the growing influence of neoliberal ideology: educational outcomes can be better measured, governed and standardised (Hufer, 2013).

In this 'post-democratic' light, political education is seen less as a fundamental right and duty and more as a means to generate human capital and (cross-border) employability in an effort to improve national economic performance and international competitiveness. Allespach, Meyer and Wentzel (2009) note that some leading adult educators support the reinterpretation of political education away from emancipation and towards employability. This narrow, instrumentalist conception of political education not only contradicts its genuine humanistic

and emancipatory purpose, but it also opposes citizens' stable interest in political education whilst decreasing their motivation for further work-related education (Kalina, 2014).¹⁰⁰

However, given the high level of social and political peace in Germany, how important is political education for the stability of democracy? Whilst this question may be answered in another research project, we will see that political education plays an important role in German trade union education. Likewise, trade union education is still playing a notable role in the field of political education in Germany.

8.2. Trade Union Education in Germany

This section explores the trade unions' course programmes with a particular view to transnational educational activities. By analysing the courses which concern cross-border issues, we receive information on the significance of transnational trade union education as well as on the extent to which the concept of Transnational Competence (TC) (chapter 4) is applied. Corresponding to the analysis of the two ETUI learning pathways (chapter 7), the share of knowledge, attitudes and skills in German trade union education is investigated. This is important because the perception of injustice as a trigger for mobilisation requires both knowledge and attitudes (the head and heart) (chapter 2). Finally, trade unions' future course ideas are captured.

8.2.1. Course Programme

DGB Bildungswerk BUND (DGB BW) has four core educational areas: *Works Councils, Political Education, Youth and Migration & Equality*. Additionally, they host conferences and workshops. The Bildungswerk's works council programme still exists due to historic reasons. Otherwise, the DGB has agreed with its affiliates to stay away from the company level (Meyer, 2015, interview). European and international issues are an interface topic in all four areas, but not a key focus. Neither is the BW involved in the educational activities of Interregional Councils (IRTUCs) (ibid).

In 2015, of 248 educational activities, 52% were for works councils, 18% for political education, 12% for youth and 17% for migration. Approximately a fifth of seminars include cross-border content (Table 8-1). Works council members can learn, for example, about 'Mental stress in European comparison'. Political Education offers 'Impact of WW1 on the German labour movement', 'Holocaust and displacement of Germans' (including European

¹⁰⁰ The folk high schools' participant statistics confirm this trend: the share of participants in 2013 in the subject area a politics/society/environment was 9.4% (596,835 absolute) and 8.7% (552,379) in work/profession (Huntemann & Reichart, 2014). Compared to 1998, participation in politics/society/environment has dropped slightly in absolute terms (629,815), while its percentage has increased rather inconsiderably (9.6%). The area work/profession lost almost half (42.7%) its participants in numbers (964,542) and 5.9 percentage points (Reitz, 1998). Most interested have people remained in health and languages. Health has gained significantly (2013: 37.2%; 1998: 29%), whereas interest in languages has rather stagnated (2013: 27.9%; 1998:29%).

Jews), 'Western life style's hidden costs', Global capitalism' as well as six educational activities on the EU and Europe. Migration is a transnational area as such, yet not all seminars go beyond German borders. Those which do include intercultural training for several professions as well as consultation on anti-discrimination, equality, anti-racism and managing diversity. Except for train the trainer activities, the majority of seminars are held on demand only. In addition, two political education seminars are referred to. Young people may visit Israel and Auschwitz through study trips, explore 'Global solidarity' and take three seminars on 'International trade unions'.

Table 8-1: **DGB BW Course Offer in 2015**

Educational Area			
Works Councils	130	1	5
Political Education/Computer & Media	36	10	54
Migration	43	23	4
North-South Network	8	8	45
Youth	31	9	48
Number of Seminars in Total	248		
Seminars with Cross-border Contents	20.6%	51	
Seminar Days with Cross-border Contents			156

Source: DGB BW Educational Programme 2015; own illustration

In addition, the *North-South-Net* (Nord-Süd-Netz) engages in international development policy. Their seminars are integrated in Political Education due for marketing reasons and organisational connections to the area (Martens, 2015, email). Besides the on-average 7 seminars offered per year between 1994 and 2015,¹⁰¹ cooperative projects are ongoing with trade union partners in Africa (South Africa), Asia (India, Indonesia, Vietnam), Latin America (Argentina, Brazil, Colombia) and Europe (Turkey). These projects are not regarded as labour education, per se. Exchange is rare and actually not anticipated because exchange is "a sensitive issue" (Meyer, 2015, interview). If German trade unionists travelled to the developing countries, the local people would believe that the Germans wanted to tell them what they had to do (ibid).¹⁰² All DGB BW seminars are in German.

Of the five DGB BW educational areas, the chapter concentrates on Political Education. This area consists of three sub-fields, which are *Politics, Economy, Society and Computer*,

¹⁰¹ Topics include the international division of labour, food and clothes production, modern slavery, global warming and resources, Far East conflict, migration, country reports on the US, India, Brazil, China, India, Africa and regional reports on the Islamic world, Latin America.

¹⁰² Arguably, it is a matter of appearance and intention, though, whether German trade unionists make or break with imperialist behaviour. What if the Southern colleagues visited Germany in order to get ideas on what they could establish in their countries?

Media, Internet and the *Environment*. The seminars target educational leavers (Bildungsurlauber) and are usually 5 days.

As part of Political Education, the issue of transnational collaboration was taken up in 1993. It started with a course on EU integration plus excursion to the border triangle of Germany-Netherlands-Belgium. The demand had been meagre. Often, the minimum of 10 participants was achieved only barely, sometimes through activating pensioners, and yet it had never been cancelled. Since 2012, the course has been narrowed to transnational labour solidarity and includes a 2-day excursion to Liège (Lüttich) in Belgium. However, the demand for 'Boundless Solidarity? Barriers and Ways of trade union collaboration in Europe' has not increased.¹⁰³ By contrast, 'Europe for Beginners', where participants visited Brussels for 2 days, usually has 30 applications for 15 places (Gehrke, 2015, interview).

Verdi has four core educational areas: *Political Education, Actives/Lay representatives, Works/Staff council members* and *Trainers* (Michelbrink, 2015, interview; Verdi, 2007). The service union has separated their educational activities between two providers. Verdi Education and Consultation (Bildung und Beratung, b+b) offers seminars for activists only – i.e., works and staff council representatives, representatives for youth, apprentices, disabled, equality as well as supervisory board members. Verdi Trade Union Political Education (Gewerkschaftspolitische Bildung, GPB) does everything else, which includes topics on the world of work, politics, history, youth and migrants, to name but a few. Additional activities are offered by the sectors which may collaborate with GPB and b+b. As a practice of solidarity, DGB BW trainers are allowed to participate in Verdi train the trainer courses since the BW has no such activities (Meyer, 2015, email). A Verdi educational activity costs, on average, €10,500 (Michelbrink, 2015, interview).

¹⁰³ The DGB BW trainer, Gehrke (2015, interview), suggests three reasons for the lack of popularity for this course: firstly, probably due to lack of knowledge about Belgium, the Netherlands/Maastricht might be perceived more interesting. Secondly, Lüttich does not seem interesting, because people are not aware that this place played a significant role in the labour movement. Second to England, it was the centre for the industrialisation of the continent and the border triangle region. Thirdly, senior Teamers agree that labour-related topics act as a deterrent. On the one hand, first-time participants – especially manual workers – fear a school-like event where they are filled up with trade union decisions. On the other hand, educational leavers prefer rather general topics. Nonetheless, they like talking to trade unionists.

Table 8-2: **Verdi Course Offer in 2015**

Educational Area			
Thereof GPB	211		
<i>Society, World of Work, Politics, Culture</i>	62	18	85
<i>Economic and Labour Market Politics</i>	40	8	40
<i>European/International</i>	15	15	80
<i>History & Current Issues</i>	18	4	25
<i>For Actives</i>	42	4	25
<i>For Particular Groups of People</i>	34	4	19
Thereof b+b	257	2	6
Number of Seminars in Total	468		
<i>Seminars with Cross-border Contents</i>	11.8%	55	
Thereof GPB	25.1%	53	
Thereof b+b	0.8%	2	
<i>Seminar Days with Cross-border Contents</i>			280

Source: Verdi Educational Programme 2015; own illustration

European and international issues have received their own headlines within the first seminar category in the GPB programme, called *Social Topics* and *Perspectives for Action*, and they amounted to 15 educational activities in 2015. However, seminars with cross-border content – may also be found in other parts of the GPB programme, for instance regarding human rights, justice, international trade, the future of trade unions, global media industry, minority groups, social utopias, climate change, sustainability of resources, poverty, and war. Young people may learn about 'Union busting', 'Globalisation, power, resistance' and the 'History of the labour movement'. Like in the first two years of Verdi, overall, about a fifth (25.1%) of GPB courses include transnational concerns in 2015 (Table 8-2). This figure has fluctuated slightly during the years with a minimum of 17.9% in 2004 (Verdi Educational Programmes 2002-15).

A rather insignificant number of seminars with cross-border content can also be identified in the b+b programme. The share of the total programme ranged between 4% in 2007 and 0.7% in 2013 and included seminars for EWCs which are outlined in more detail in section 10.3. Other topics have been reduced since 2013 to the integration and representation of migrants in the firm as well as the matter of agency and contract workers, also under the Directive on Temporary Agency Work (2008/104/EC). Earlier, related issues like discrimination, racism, xenophobia were also covered (Verdi Educational Programmes 2002-15).

As the Verdi b+b Managing Director of the Berlin branch explains, the low number of seminars with cross-border content happens because works council members in Multinationals rarely apply for suchlike seminars. They perceive European topics as 'nice to have' which they do not have time for because they are busy with more pressing items, like staff reduction,

outsourcing, bullying, etc. Hence, typically, works council members in the private sector are interested in company-related legislation, whereas employee representatives in the public sector opt for public law and administrative regulations (Hauck, 2015, interview). In other words, the capacities of national employee representatives are fully exhausted by immediate and reactive firefighting activities. Furthermore, Hauck argues that employers watch very closely what seminars they pay for. If an EWC is neither established nor anticipated in a MNC, why should employers pay? According to § 37,6 Works Constitution Act, employers must pay for 'necessary training'. Therefore, employers may refuse to pay for transitional training as a preventative or preparatory measure (ibid).

Similarly, IGM has divided its educational programme into two booklets. One is dedicated to works councils, supervisory board members and representatives for special groups of workers, such as disabled and youth/apprentices. The other is for 'Vertrauensleute' and other *Activists in the Firm and Society* who take educational leave. It adds to the first booklet the areas of *Social-Political Further Education*, *Forum Political Education* and train the trainer seminars for *Tutors and Multipliers*. The headline *Social-Political Further Education* includes, amongst others, history, economy and ecology as well as the categories *Political Youth Education* and *International Education*. Unlike DGB and Verdi, IGM has not outsourced their education to in-house, independent organisations.

European and international seminars have not received a headline, like in Verdi, but are dispersed within the programme. In 2015, they amount to 19 activities on 177 days (Table 8-3). Workers' representatives can avail themselves of 'Intercultural competence for works councils', 'European Labour Law: The ECJ', 'Co-determination in International Corporations' and preparing for the European Business Competence Licence (EBC*L). EWC-related activities are outlined separately in section 8.4. *Social-Political Further Education* includes 'Critical perspectives on Europe: Nation, exclusion, crisis', 'Political Europe – Basics', 'BRIC and the US'. *Forum Political Education* hosts the 'Europe in Exchange - Summer School' whilst young members can 'Think global, act local' and learn 'Europe step by step' in three steps. For tutors and multipliers, an English course is in place.

Other seminars with cross-border content concern discrimination and racism in the company as well as 'Intercultural competence for actives and multipliers'. Applicants for the 2.5-year traineeship in 'International Project Management' should speak at least one foreign language, preferably English. In total, the 2015 programme contains 25 educational activities (8.2%) that dealt with transnational issues on 219 seminar days (Table 8-3).

Table 8-3: **IG Metall Course Offer in 2015**

Educational Area				
<i>Introductory Seminars</i>	1		-	
<i>Works Council Compact</i>	6		-	
<i>Shop Stewards Compact</i>	4		-	
<i>Professional Further Education incl. Co-determination Academy</i>	236	7	11	79
<i>Political Education</i>	4	-	1	6
<i>Social-political Further Education</i>	28	13	12	129
<i>Tutors and Multipliers</i>	25	9	1	5
Number of Seminars in Total	304			
<i>Seminars with Cross-border Contents</i>	8.2%		25	
<i>Seminar Days with Cross-border Contents</i>				219
<i>European/International</i>			19	177

Source: IGM Educational Programme 2015; own illustration

8.2.1.1. *Course programme For Trade Union Staff*

For DGB staff (Hauptamtliche), a separate programme for Weiterbildung (further professional education) is in place, which is organised and monitored by the DGB BW. The 2015 programme comprises seminars on three competence areas: strategic, methodic-social and professional. Within strategic competence, 4 seminars can be considered transnational education: 'Europe in Crisis: Old Structures and New Conflicts? Joint seminar of DGB, FES, HBS and SPD' is a 3-day seminar for young people. Regional leaders, EURES consultants and political secretaries may go to Brussels for a 3-day activity on the EU in theory and practice. All DGB staff are welcome to deliberate on 'Right-wing Populism and Right-Wing Extremism' for 3 days. New is a 1-day activity on 'Fair working conditions for employees from the EU' for political secretaries. Of all 72 educational activities, this is all regarding cross-border issues. Moreover, reference is made to ETUI Education and Global Labour University.

Educational activities for DGB staff are quite difficult to fill. DGB staff may participate in DGB BW seminars as educational leavers, yet only a small minority shows up in Political Education (Gehrke, 2015, interview; Kubik, 2015, interview).

IGM employs approximately 2,500 staff (IGM, 2014) who may choose from *Personnel Development/Training* and *Further Education for Staff*. The 2015 programme consists of 9 areas, which are Members' Development, Corporate Policy/Law, Collective Bargaining Policy, Current Trade Union and Socio-Political Issues, Leadership Development, Finance, Social-Methodical Competence/Communication, Work and Apprenticeship at IG Metall and IT (author's translation). Every seminar indicates whether administrators and/or political secretaries are invited to apply.

A Training Pathway has been developed for administrative personnel, whereas a Development Pathway is in place for professional and lay political secretaries. The latter pathways include training. The fact that a distinction is made between training for administrators and development and training for political secretaries suggests a hierarchy of importance for the trade union suggestive of the detachment between doing and thinking in Taylor's Scientific Management, administrative staff seem only trained to function better within the organisation, whilst wider political and strategic consideration appears reserved for political staff. Administrative personnel is free to use their educational leave on political education, but do they do it?

The hypothesis that functionalist ideology has found its way into human resource development at IGM may be underpinned through a look into the transnational contents of the programme. A 3-day seminar on 'The European crisis and trade unions' policies' was offered twice in 2015 and targets political secretaries only. Fifty lay representatives (works council, youth/apprentice, shop stewards) per year may pursue an 11-month study course at the European Academy of Labour (EAdA, Europäische Akademie der Arbeit) at Frankfurt University from which they may proceed to subject-related university studies in the Land Hesse.

Both administrative and professional political secretaries may attend a 5-day English refresher course. Voluntarily, political secretaries can draw on respective courses for members. Interestingly, the demand for the more comprehensive course which IGM had offered for 15 years has declined so much as to have it withdrawn from the 2015 programme.¹⁰⁴ The 1-year Master degree in Global Labour Policies as well as the 3.5-month Certificate in Labour Policies and Globalisation by the Global Labour University consortium is open to English-speaking union administrators and political secretaries in addition to works council members under the condition that they are or will be involved in transnational work/transnational companies. Once administrators have completed the Master's degree, it seems reasonable to assume that they might want to proceed from an administrative to a political level.

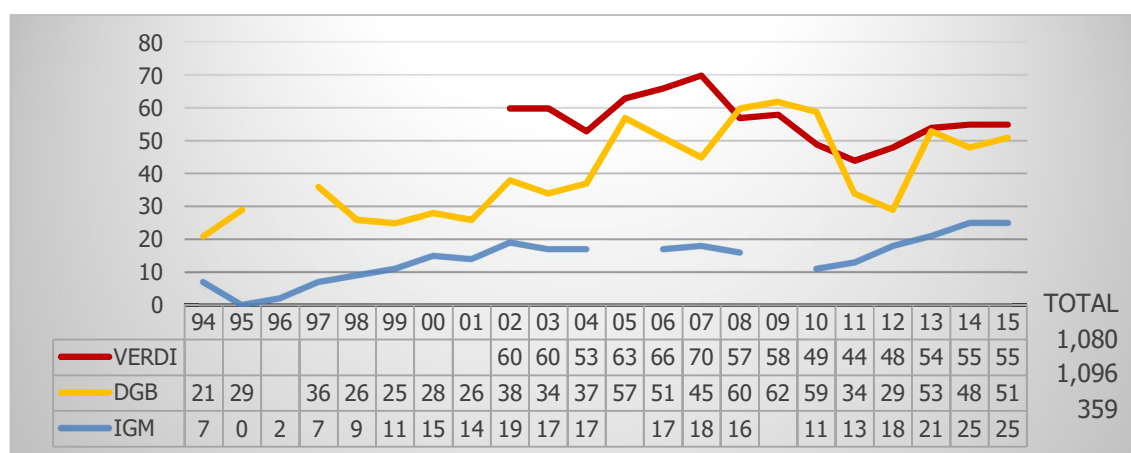
Finally, ETUI courses are referred to as potentially interesting for IG Metall staff. Applications may be handed to the IGM Head of Personnel Development and ETUI Pedagogical Committee member, Joachim Beerhorst.

¹⁰⁴ So far, IGM has offered an English course in three parts, where one part is a 9-day excursion to the UK.

8.2.2. Transnational Courses

In order to evaluate the transnational orientation in the educational programmes, the author has taken a wider perspective than the respective unions suggest. Arguably, the analysis would fall short if the only seminars that counted were under the headlines 'European and international'. Also, racism, migration, right-wing extremism, terrorism, war, xenophobia, global media and capitalism, human rights and society, energy and environmental concerns are all, for instance, cross-border issues. Therefore, any such educational activities have been counted as 'transnational course', no matter under which programme section they fall. The following graph illustrates the development of educational activities on offer by DGB BW, Verdi and IGM since 1994 that have a transnational concern (Figure 8-1).

Figure 8-1: **Transnational Courses at DGB BW, Verdi and IGM 1995-2015**



Source: DGB BW Educational Programmes 1994-2015, without 1996, without Youth Education 1994-2004, without Works Councils 2010, without Migration 2011/12; Verdi Educational Programmes 2002-15; IGM Educational Programmes 1994-2015, without 1995, 2005, 2009; own illustration

Quantitatively, Verdi has more or less the biggest offering of transnational courses. Whilst its difference from the DGB BW has diminished over the years, the gap to IGM is still profound. In 2015, Verdi provided more than twice as many transnational courses as IGM. This result is surprising as the service sector is not as directly exposed to the global economy as, by comparison, to the export-oriented German manufacturing sector. Secondly striking is that the importance of transnational concerns has risen since the mid-90s for DGB BW and IGM, as a clear upward trend in the number of transnational courses is visible. As for Verdi, the trend is the opposite since its foundation, notwithstanding a new uptick in 2011. The increase in transnational courses may have been a response to the European and global crises.

However, if we consider the share of transnational courses among the total number of educational activities each year, Verdi appears quite stable in its consideration of cross-border issues. The percentage varies between 9.7% in 2004 and 12.7% in 2006. In 2015, it stood at 11.8% (Verdi Educational Programmes 2002-15). IGM, to the contrary, saw a steady increase

from the very low of 1.4% in 1996 to the peak of 12.8% in 2004. Since then, the share of transnational courses dropped to 8.2% in 2015 (IGM Educational Programmes 1994-2015, without 1995, 2005, 2009).

For DGB BW, data between 1994 and 2004 and 2012-12 was not fully available. The remaining years point to a share of transnational courses that fluctuates around a fifth, between a low in 2006 (14.1%) and a high in 2013 (22.7%). In 2015, 20.6% of the seminars included cross-border issues (DGB BW Educational Programmes 1994-2015, without 1996). Kubik (2015, interview) suggests that the BW to increase investment in the conceptualisation and implementation of transnational courses.

IGM (2014) regards education as central to enabling trade unions to act internationally. Given the rather low share of transnational courses in the Verdi and IGM programmes, the two unions do not prioritise transnational collaboration. Nominally, however, we can see a newly increasing concern for cross-border topics in the services and the metal sectors since 2010/11. The DGB appears, generally, to be more significantly pushing for cross-border education.

8.2.2.1. Significance of Transnational Trade Union Education

Indicative of how trade unions in Germany prepare their members for transnational collaboration is, first, to what extent educational activities with cross-border contents are available. In 2015, approximately a fifth of around 250 DGB BW courses are of transnational concern. Interesting is, however, for which target groups suchlike courses are offered. Of 44 political education seminars, 18 for educational leavers take a transnational view, which is well more than a third. Similarly, roughly a third of youth seminars have a transnational dimension. By contrast, cross-border issues do not appear of big interest to workers' representatives and activists, since 'their' educational activities seem to look beyond national borders hardly ever. This is striking because works council members and union activists have much more collective power compared to the individual participants in political education and youth seminars.

The picture is similar in Verdi. About a fifth of roughly 210 political education courses, including youth seminars, have cross-border contents. To the contrary, a rather insignificant number of seminars have transnational topics: namely, 2 that target employees' representatives and board members. Overall, of around 470 educational activities, roughly 12% go beyond national borders. European and international subjects have received their own headline in the political education programme, but they may also be found in other sections of it.

The metal workers' union has dispersed European and international issues within their programme, but it provides a compact overview of 'international educational offers'. IGM is also exceptional in that it has created its own department for international labour education. However, just over 8% of IGM educational activities can be considered transnational. IGM

offers slightly fewer seminars for workers' representatives and activists than Verdi (namely, around 250). Although significantly more of them (11) include transnational items, the share is yet only 0.04%. In political education, which comprises youth education, too, 13 of 32 activities deal with cross-border concerns. We may, furthermore, notice that, unlike Verdi, IGM dedicates to political education just a fraction of its educational space for employees' representatives. The union argues that seminars for works council members, health and safety representatives, etc. will always be a form of political education. Moreover, the advertised target group for political education seminars always include them as well.

Over time, it is difficult to say whether transnational issues have gained importance in German trade union education. Nominally, a clear upward trend in the amount of transnational courses has been visible for DGB BW and IGM since the mid-90s. As for Verdi, the trend has been the opposite since its foundation in 2001, notwithstanding a new uprising since 2011. The share of transnational activities in the unions' educational programmes points to a different picture, though. Both DGB BW and Verdi appear quite stable in their consideration for cross-border concerns. IGM, by contrast, increased steadily its share from the very low of 1.4% in 1996 to the peak of 12.8% in 2004. Since then, the share of transnational courses dropped to 8.2% in 2015.

In sum, transnational trade union education is present in the German trade union movement, but it seems a minor field of concern for the sectoral unions compared to the plethora of their other educational activities. Like for the DGB BW, works and staff council training is the educational focus of both Verdi and IGM. Since DGB BW must actually stay away from the company level and keep up their programmes for labour representatives for historic reasons, the confederation appears to engage considerably more in cross-border education than its affiliates.

If trade union members look beyond national borders, seemingly, they do so more in the role of educational leavers than workers' representative and trade union activists, unless representatives and activists take their educational leave for cross-border political education. Thus, German workers and their representatives appear to view transnational labour collaboration and solidarity actions as rather a luxury than as part of labour's daily 'bread and butter'.

8.2.2.2. Transnational Competence Profile

In this section, the educational activities of DGB BW, Verdi and IGM are viewed through the framework of Transnational Competence (TC) (chapter 4). It assesses the extent to which trade union education in Germany fosters each of the six sub-competencies – i.e., transformative, analytic, communicative, emotional, creative/imaginative and functional.

As German trade unions do not have any structured description of trade union education comparable to the ETUI ETUR and EWC learning pathway, it is difficult to evaluate the extent to which Transnational Competence is nurtured. In order to provide more accurate results, all 130 plus transnational educational activities in 2015 required deeper enquiry into their proposed learning outcomes. Such an analysis is beyond the scope of this research. The DGB BW, Verdi and IGM course programme for 2015, nonetheless, can lead us to state the following:

8.2.2.2.1. Analytic

The three trade unions can certainly enable their participants to understand the economic, political, social and ecologic environment/dynamics and actors' strategy/decision-making in Germany as well as Europe and the world. Since Verdi and IGM advocate a critical-emancipatory approach to education and DGB BW teamers do likewise, it is probable that participants are encouraged to reflect critically on the behaviour of self, others and the respective internal and external contexts. Also, connections between human behaviour and its outcomes do likely matter in the seminars. How far commonalities and differences are discussed cannot be assessed.

Due to its addressing the national, European and global levels, trade union education in Germany attempts to adopt a deep/multi-level (vertical) view. Given the substantial variety of educational activities, the perspective is broad (horizontal) as well. For all three unions, it is important to facilitate participants establishing connections and understanding the complexities of today. Therefore, bridge-building between individual and collective concerns can be expected. Since the educational offers cover history, current issues and deliberations about the future, it is, furthermore, likely that immediate/short-term and ongoing/long-term considerations are present. Since connected learning is seen as essential, the field of tension between individual/collective and short/long-term demands might, likewise, be outlined. All three course programmes inspire participants to go beyond 'bread and butter' issues and connect local/national events with wider global struggles. Whether the insights of mobilisation theory are shared requires further investigation.

It seems, therefore, fair to say that analytical competence is well attended, although some gaps probably remain.

8.2.2.2.2. *Creative/Imaginative*

The three trade unions aspire to stimulate participants' creativity and imagination. However, the extent to which this concerns the labour movement in terms of potential allies, contestation spaces, union types and strategies, new labour internationalism, etc. seems rather low. Whilst political education does exceptionally deal with topics that relate purely to trade unions,¹⁰⁵ educational activities for representatives and activists concentrate on the corporate environment. How far labour and society are connected in the seminars in order to create an imagination of a cross-border/regional/global community, let alone 'community of fate', is hence quite questionable. Only the IGM youth has been facilitated to 'Think globally, act locally' since 2010.

Nonetheless, participants are encouraged to think about social, economic, political and environmental alternatives. It is doubtful, though, how radically these alternatives are anticipated. 'Think utopia, change reality' was a course in IGM political education in 2011. Since then, the word 'utopia' has never reoccurred in their programme. To the contrary, Verdi GPB used the word in 2005 for the first time, and it has featured in course titles again since 2010. DGB BW offered 'Utopia and capitalism – is the labour movement dead?' in 2002, but it has not referred to utopia in terms of transnational issues since.

In short, creativity and imagination are considered in German trade union education. However, whether the alternative thinking encouraged is radical and utopian enough for transformative action is doubtful.

8.2.2.2.3. *Communicative*

Communication, presentation and publication skills seem important to DGB BW, Verdi and IGM, especially for labour representatives and activists. However, the main language is German. DGB BW did not offer any course in English or another language in 2015. A weekend of 'English for Trade Unionists' was available from 2010-14, as was a week of 'English for works councilers' in 2009 and 2004. 2006 to 2008 saw a 2-week Spanish course for trade unionists. In 1997, a one-week course in English and French each was available for works councilers. Due to their short period of time, the courses targeted people with intermediate language skills.

In Verdi, the only educational activity in another language than German in 2015 was the bilingual seminar (German/Turkish) 'From Kanak Attak to Eklektik Berlinistan - The present in Germany'. In 2012 and 2011, the services union offered a bilingual (German/English) induction seminar on the German Works Constitution Act. A week of 'English for EWCs' was offered in

¹⁰⁵ Verdi offers 'The future of trade unions: awakening or transition?' which includes also transnational solidarity, and two youth seminars on 'Union busting - do we approach US-American conditions?' and the 'History of the labour movement'. IGM looks into 'The birth of the labour movement as learning process'. DGB BW provides, as mentioned above, 'Boundless Solidarity? Barriers and Ways of trade union collaboration in Europe' and two youth seminars ('International trade unions - Strong in the company/representation body' and 'International trade unions - Active in Europe').

2003 and 2006. Also, 'Polish for trade unionists and works/staff councils' (basic/advanced) could be booked in 2006.

IGM has held a week of 'Business English for EWC/WC/General and Group WC', a 6-day 'English Power Special' as well as 'English Refresher for (E)WCs' since 2010. The first two seminars were open to beginners and intermediate speakers, whereas the third was for intermediate only. Since 2013, a three-day course on 'English for works councils in international bodies' has been in place. Since 2012, technical staff can improve their English during a week's course. Participants who apply for 'International Project Management' should speak at least one foreign language, preferably English. From 1999 to 2008, language courses had been available wherein the language was not specified.

Additionally, the metal workers have been consistently involved in intercultural training for roughly a decade. Seminars on 'Intercultural Dialogue' took place between 1997 and 2008, starting with Germany-Spain and enlarged to seminars regarding relations with Austria, Switzerland, France, Italy, Britain, the CEECs and Nordic neighbours, Russia, Greece, and Turkey. Probably a successor seminar, intercultural competence became available for activists and multipliers in 2011 and for works council members the year after.

As a result, DGB BW and Verdi limit transnational communicative competence to the German-speaking world (i.e., Austria, Switzerland, Luxembourg, Liechtenstein) as well as minorities in Europe, Latin America, North America and Austral-Asia. Spanish, French and Polish courses are long past. IGM appears committed to providing English and intercultural dialogue. It remains yet unclear to what extent the vocabulary of different target groups at different levels are provided and dialogue facilitated, where people listen actively and communicate openly and honestly, involving the four human elements and six senses.

8.2.2.2.4. Functional

Functional competence in terms of labour representatives' and activists' role in the company is undoubtedly core to DGB BW, Verdi and IGM. For DGB affiliates appears likewise important to prepare representatives and activists as a bridge to the trade union. However, health and safety, conflict, people and project management, leadership, exploitation of labour and social legislation, negotiation, IT application, organising, etc. are primarily seen in the national context. If applicable, European legislation may be included in the seminars.

More genuine cross-border topics are rare in DGB BW and Verdi. The BW offered, in 2015, a week on 'Mental stress in European comparison' for works councils and two youth seminars, one concerning 'Strategies against racism in everyday life' and the 'Working group Internationalism'. The services union informs about 'Integration of migrants' and 'Agency and contract workers', which includes EU Directive 2008/104/EG.

IGM, to the contrary, provides more transnational functional competence. In 2014, there were introduced 10 yearly places for the 2.5 year traineeship in International Project Management as well as 3 days on 'Co-determination in international corporations'. Since 2012, participants can achieve two of three levels of the certified European Business Competence* Licence (EBC*L). Since 2010, participants can learn, in 3 days, how to optimise EWCs' practice. National EWC workshops have been offered since 1998 and were complemented by a yearly international EWC workshop in 2001. A week on European labour law was held in 2008, 2011 and from 2013 to today.

In sum, some courses beneficial for transnational functional competence are visible in German trade union education, particularly in the metal industry. Determining how participants are facilitated in researching relevant issues comprehensively and exchanging information, building and maintaining collaborative cross-border networks as well as improving suitable resources, however, requires further analysis.

8.2.2.2.5. Emotional

Reference points in the three unions' educational programmes which may be attached to emotional competence appear not to match the definition of emotional competence. A number of seminars seem to regard as important compassion to self, others and the environment and pay respect and empathy to others in terms of history, current circumstances and future plans.

Verdi political education has the most extensive range on these issues. Their seminars have included World Wars I and II and the genocide of Jews in one way or another since 2003. Racism and migration has been a topic since 2002. Since 2011, the disrespect of the Sinti and Roma as Europe's biggest minority has been covered, as has 'Crises - their impact on people's everyday life, its sources and alternative politics', including the European dimension, was introduced in 2013. Global hunger has been on the agenda since 2012 and is, this year, addressed in three educational activities. Exemplified by chocolate, the issue of fair work and trade has been discussed since 2013. 'The price of the good life' has been a topic since 2014 to address inhumane production conditions in China and Bangladesh. The worldwide destruction of the environment and the sustainability of global resources were dealt with in several courses in 2015, but have been at issue since 2002.

Likewise, DGB BW attends, in its political education, to the holocaust of World War II, with a study trip to Auschwitz and an Israel exchange (since 2010) for the young. Additionally, the 'Israel-Palestine Far East conflict' has remained a recurrent topic since 1995. Racism and migration have also been on the agenda continuously since 1995. 'Western life style's hidden costs', 'The global poor: immigrants', 'Slavery and forced labour in the 21st century' and 'Death by hunger in poor countries' relate to the unequal distribution of power and wealth between the more developed and developing countries of the globe. This imbalance has been addressed

since at least 1994. The environment is considered in 'Oil, water and scarce soils' and 'Global warming', and similar seminars have been on offer at least since 1994.

As opposed to Verdi and DGB BW, IGM has not given worldwide climate change and the exploitation of natural resources a distinct space in their educational programme. Their focus on compassion to self and others can be seen in their activities on human working conditions, such as health and safety and work flow organisation. However, these activities concern the local German firm as opposed to global supply chains. In 1997 and from 2010 to today, anti-racism educational activity has been in place. Since 2013, two 3-day activities on discrimination in the firm have been available.

Another point essential for transnational emotional competence is a constructive commitment to transnational labour solidarity. A few indicative educational activities can be found in the DGB BW and Verdi programme. As stated earlier, DGB BW has offered for educational leaders, since 2012, a week regarding 'Boundless Solidarity? Barriers and Ways of trade union collaboration in Europe'. A 3-day activity on global solidarity has been in place for the young at least since 2005. Since 2011, the seminar has been offered in collaboration with the Global Labour University. In 2015, another youth seminar on 'International trade unions - Global Solidarity' could be attended for 3 days.

Verdi political education has promoted, since 2010, 'For a lived solidarity at work', especially where an international workforce is concerned. Another 5-day activity on trade union revitalisation, including transnational solidarity, has appeared in the programme since 2005. However, apart from the examples of the ports and the Right2Water campaign as well as Amazon and Telekom, Verdi members have had difficulty acting.

IGM provides a youth seminar on 'Solidarity – Back to the future', and 'Cooperation, solidarity and resistance' for all ages, but it is not clear to what extent solidarity is also seen as occurring beyond national borders. In 2014, a seminar called 'International solidarity?!' took place.

In brief, transnational emotional competence is covered only on the selected issue of compassion and solidarity. DGB BW and Verdi take leadership here, whilst IGM might not go much beyond national borders. For information on the remaining features which were defined as making up emotional competence (open for change, curious to meet the unpredictable/unknown, brave to take risks, self-confident to pro-act (can-do-attitude), readiness and perseverance to fight, appreciation of continuous and mutual learning and de-learning), a deeper view into the course work would be necessary. It is possible that participants can gain these attitudes from attendance of educational activities. The question, nonetheless, remains whether trade unions develop these attitudes deliberately or not.

8.2.2.2.6. *Transformative*

As we know from mobilisation theory (chapter 2), the key to transformative action is the perception of injustice. One characteristic of transformative competence is following the ideology of worldwide egalitarian democracy, justice, human equity and ecological sustainability. Verdi seems to be a pioneer in this respect. GPB made 'Living Human Rights' a key issue in 2015, but it touched upon this topic already in 2004. Besides five transnational activities on human rights,¹⁰⁶ another deals with the question 'What is justice?'. The Verdi GPB executive director advocates the view that "the question of justice must not only be asked in Germany, but also Europe- and worldwide" (Verdi course programme 2015: 6, author's translation). The same applies to democracy, as seminars consider 'Democracy in the company and office' in addition to 'Democracy, human rights and the world of work'. As noted earlier, sustainability appears important to Verdi education too, locally as much as and globally. Where one seminar explores 'Sustainability in the company and office', another ponders 'What does the world cost? - Climate change for cheap sell'.

DGB BW does not offer a seminar on social democracy political education other than a youth course series to become a 'Betzavta-Trainer'¹⁰⁷ and an activity on 'Role conduct, political opportunism and civil courage in democracy and dictatorship'. Further data would be necessary to evaluate the extent to which democracy is also viewed in society globally. The word 'democracy' does not appear in the 2015 programme for works councils and other labour representatives, except for a description of a seminar on leadership skills for works council chairs. A course on 'Human rights building in youth work and school' was held in 2007, but human rights have not been featured in any political education seminar title since. Nonetheless, the issue is present this year through an activity on 'Slavery and forced labour in the 21st century'. Again, 'human rights' are not at issue in the 2015 programme for works councils and other labour representatives. Between 2009 and 2014, political education on 'Global injustice' was offered. The above mentioned courses on 'Global warming' and 'Oil, water and scarce soils' indicated a concern for ecologic sustainability.

For the first time, IGM has decorated their 2015 programme with several quotes from the Universal Declaration of Human Rights (UDHR). Neither in the current programme nor in the previous one do course titles or descriptions include human rights, though. 'Justice' appears in relation to equal pay for women, evaluation systems at work and other working conditions in the local firm, but not in global terms. Democracy is, likewise, analysed regarding Germany. It seems, hence, that the metal workers' union educates participants in terms of social

¹⁰⁶ 'Philosophy of human rights and social reality', 'Human rights - from vision to reality?', 'Women and human rights', 'Human rights in danger?', 'China - Human rights and civil society'.

¹⁰⁷ Betzavta is a Hebrew word and means 'together, jointly'. The traineeship was developed by the ADAM-Institute in Jerusalem.

democracy, justice, human equity and ecological sustainability more locally and nationally than beyond.

Another feature of transnational transformative competence is wisdom and critical consciousness. To what extent (inner) wisdom is facilitated, for instance, through quotes from thought leaders and visionaries regarding the meaning in and of life as well as exercises to connect with the intuition is not visible from the educational programmes. Yet, we know that critical consciousness appears important to the services and metal union since both Verdi and IGM subscribe to a critical-emancipatory approach to trade union education. Since DGB BW (2010) appears to have followed a social constructivist approach to education so far, the transformative value of their education appears fairly questionable. As will be outlined in the subsequent section, some tutors have, however, applied critical pedagogy in their courses. Official change towards critical pedagogy was agreed upon at the DGB Educational Congress in January 2015. It remains to be seen whether DGB BW education will enhance transnational transformative competence more consistently in the future.

Rekindling the utopian vision of international solidarity and creating a higher spirit of transnational unity is suggested as a further component of transnational transformative competence. As stated earlier, DGB BW has offered for educational leaders, since 2012, a week regarding labour solidarity in Europe. The view on trade union collaboration is, however, not extended beyond the continent, whereas it is in the two activities on international solidarity addressed to the young. Additionally, every year, young people of the Arbeitskreis Internationales (AKI) and other interested participants can meet the Master's students at the Global Labour University to discuss global labour solidarity.

Verdi GPB suggests that "trade unions' power to shape the future will depend on whether international relationships and their effects are sufficiently analysed and incorporated into political action" (Verdi course programme 2015: 44, author's translation). The union's European and international seminars are offered to address this. Transnational labour solidarity was the matter of one course on the future of trade unions that was introduced in 2008. Another utopian political education activity, since 2007, concerned a non-hierarchical human society. As mentioned earlier, since 2010, 'For a lived solidarity at work' concerns an international workforce. Another 5-day activity on trade union revitalisation, including transnational solidarity, has appeared in the programme since 2005.

Similarly, IGM provides European and international courses as a precondition for creating "social and ecologic change in Europe, and more just working and living conditions worldwide".¹⁰⁸ As we recall, the seminars offered for labour representatives concentrated on introducing and optimising EWC/SERB practice, English and intercultural competence for body

¹⁰⁸ Bertin Eichler in IGM *Seminars for International Education 2014*, p. 2-3, author's translation.

members, knowledge on co-determination in MNCs and European labour law and international project management. Young and mature people can learn about European institutions, integration processes, industrial relations systems and other 'basics', whilst IGM youth are also encouraged to 'think locally, act globally'. As noted earlier, another youth seminar regards 'Solidarity – Back to the future', whereas 'Cooperation, solidarity and resistance' is open to all ages. To what extent solidarity is also addressed beyond national borders remains unclear. A seminar called 'International solidarity?!' took place in 2014. Bertin Eichler, former IGM Board member, insists that the kind of solidarity which trade unions in Europe developed 150 years ago on the basis of thinking and acting together "is currently more important than ever".¹⁰⁹

Another characteristic of transnational transformative competence involves advocating more long-term (r)evolution than short-term gains. Arguably, all three trade unions work towards both immediate and long-term changes. However, as argued regarding the creative-imaginative competence, whether transformations are achieved quickly or grow more organically depends on how radical the food for thought distributed and evolving in the educational activities is.

Finally, whether participants are facilitated to liberate workers (i.e., themselves) from oppressors and oppressed at all levels and emancipate themselves towards humanisation and happiness is difficult to tell. Verdi and its utopia for a non-hierarchical society as well as its course on 'Life quality - How do we treat our time?' are, arguably, one step towards humanisation. Since 2011, the course has viewed time in international comparison, and it might provide a space to reflect on the ideologies of the more developed world. Also, three educational areas which GPB plans to include in the future programme – i.e., inequality (discrimination, racism, xenophobia), Europe between exclusion and inclusion (global justice, sustainability, access to resources) and fundamental social and human rights (social democracy, war and peace) – seem promising. However, since Verdi members are not involved in the planning process, it is questionable to what extent this selection will meet the participants' educational interests.

Meanwhile, DGB BW might cancel 'climate change' because participants seem to have lost interest in this topic. Yet, Verdi's and DGB BW's focus on global environmental concerns and deliberations on the worldwide inequality in economic and political power as well as social wealth is certainly supportive for transformative competence.

The DGB BW political education expert wished that more seminars would be offered that strengthened collective thinking towards social, political and economic change instead of what he felt was individual self-optimisation in the service of increased economic output. After all, he believed, political education would not be about skills training but about emancipatory

¹⁰⁹ Bertin Eichler in IGM *Seminars for International Education 2014*, p. 2-3, author's translation.

debates (Kubik, 2015, interview). At the same time, the Verdi GPB executive director argued that members do not have a Humboldtian understanding of education and would be in search of themselves as a function and not as a human being (Michelbrink, 2015, interview). Given this, trade unions' predominant understanding of trade union education as a functional tool for organisational capacity building would actually meet members' desire for 'ökonomische Zweckschulung' (see chapter 3).

In sum, although gaps remain, several courses offered by Verdi appear suitable for developing transnational transformative competence. Also, DGB BW provides a few courses with opportunities to become more transformative. IGM's programme seems least helpful in transformative terms, whereas transformative ideas might not always be destined to reach beyond national borders.

Overall, German trade union education touches upon all six transnational competencies, albeit to different extents. All three trade unions seem prepared most to facilitate analytic competence. Communicative and functional competence is also important for German trade unions, but for Verdi more than DGB BW and IGM in view of Verdi's national and German-speaking context. IGM appears most developed regarding functional and communicative competence with particular emphasis on the English language. However, all three trade unions miss out on several items which the TC framework defines as communicative and functional competence. Similar gaps are true for creativity and imagination. Verdi seems to be the leader in building transnational transformative competence, as the union's courses relate to more transformative features than DGB BW's and IGM's and match the TC framework closely. IGM's programme seems least helpful not only in transformative terms but also regarding emotional competence. This is striking as the education of emotions is a declared aim, even if it is second to knowledge and skills (IGM, 2014). However, DGB BW and Verdi seem furthest away from offering courses that address the definition of transnational emotional competence.

8.2.3. Education Triangle: Distribution of Knowledge – Attitudes – Skills

DGB BW (2010) concentrates on the provision of professional knowledge and competencies in order to improve participants' ability to shape the world of work. Professional competence means, for the BW, that learners become able to withstand insecurities as well as conflicts and search for solutions. Attitudes are not an explicit educational aim of the BW, but the BW also mentions that learners should replace dichotomous 'either or' thinking with a more encompassing 'as well as' perspective, yet these ways of thinking are apparently assumed to evolve as a result of the provision of knowledge and skills.

Verdi (2007) focuses, likewise, on providing knowledge and skills in order to enable participants to identify connections between the economic and social worlds. Interestingly, the political and environmental spheres seems not of immediate concern. Like DGB BW, Verdi does

not pay explicit attention to attitudes in their understanding of trade union education. At the same time, the services union wants their members to become confident and emancipated people who act deliberately and reasonably. For so doing, members would need to “combine knowledge, thinking, feeling and willingness” (p. 17, author’s translation). Thus, like DGB BW, Verdi seems to consider it the members’ responsibility to grow appropriate attitudes as a byproduct of the knowledge and skills they receive from the union.

IGM (2014) also proposes to develop knowledge and skills with the aim of facilitating professional competence and efficiency. IGM has realised, though, that attitudes are vital, not only for becoming competent and efficient, but as “the basis of orientation, evaluation and motivation” (ibid: 22, author’s translation). Reflection on attitudes would, therefore, always be included in their educational activities. Interestingly, collective attitudes are not referred to. Although attitudes appear to receive a dedicated space in IGM education, they seem not to be put on an equal level with knowledge and skills. This hierarchy is evident even in the union’s 10 guidelines for trade union education, where ‘new knowledge and action’ are mentioned first, whilst ‘work on attitudes’ is detached as the second point (p. 20).

The hierarchy between knowledge and skills, on the one hand, and attitudes, on the other, however, contradicts IGM’s aim to utilise education as an organising tool: “head and heart must be in unison so that the hand writes down the name on the declaration of membership” (Kehrbaum, 2015: 1 author’s translation).¹¹⁰ Verdi aims, likewise, at using education for membership organising.

In sum, all three German trade union organisations appear to understand trade union education as the provision of knowledge and skills. DGB BW and Verdi appear to consider the development of attitudes as self-evident and as the responsibility of their members. IGM attends to attitudes explicitly, but it appears to view them secondary to knowledge and skills. However, since German trade unions do not have any structured description of trade union education comparable to the ETUI ETUR and EWC learning pathway, it is difficult to assess the extent to which knowledge, attitudes and skills are actually taught.

However, the official organisational view does not necessarily meet the perspective of educational staff. For the Verdi GPB executive director, trade union education includes head, heart and hand in equal amounts; he describes education as an interconnection of *Wissen* (knowledge), *Wollen* (desire) and *Können* (ability). He suggests that, in order to make the organisation as well as its members fit for the future, Verdi had to increase its facilitation of attitudes in particular; or, more precisely, values. Neoliberalism would have altered people’s

¹¹⁰ Recruitment may be done indirectly through raising the issue during the seminar as well through the tutors approaching participants directly (Kehrbaum, 2015). Around 730 activists attended a communication training for membership recruitment in September 2014. First results indicate that the participants’ efforts are above average (IGM, 2015).

values towards individualism and the inevitability of injustice. Arguably, both are poison for trade union action, nationally as much as transnationally.

Michelbrink's observation corresponds to mobilisation theory (chapter 2), which advocates the view that attitudes are the centre from which action arises. Therefore, if anything, attitudes need to be given a central place in German trade union education, where knowledge and skills serve to form attitudes – not vice versa.

8.2.4. Course Planning

In DGB BW Political Education, the head of department proposes the yearly range of topics and discusses it with the teamers – i.e., the freelance seminar facilitators. Like Verdi and IGM, the BW calls their trainers 'Teamers' to capture the idea of equality between teacher and learner. Amendments and supplements can also arise through meetings with the permanently employed colleagues of BW, which the Executive Director joins (Kubik, 2015, email).

In Verdi, the 13 industry divisions set out a rough idea of their educational requirements. However, the divisions do not involve their members in decision-making. On this basis, the educational centres provide offers. The staff in the educational centres know best how to match participants' demands with the costs and benefits of maximal house occupation rates (Michelbrink, 2015, interview).

The programme is equal to the previous one, at about 80% (Michelbrink, 2015, interview). Seminars like time and stress management, burnout, addiction and other health-related issues are always relevant and updated. In other cases, GPB is not always content with the divisions' proposals. A "comfort of the masses" (ibid, author's translation) has resulted in sluggish responses to pressing issues during the last decade. Yet again, what GPB finds pressing does not necessarily meet the perceptions of potential participants. Racism-related seminars would, for instance, not be attended much (ibid). However, Michelbrink does not intervene in an authoritarian way and refuses course proposals. IGM, to the contrary, decides in a much more top-down in this respect (ibid).

As a result, different perceptions on the educational needs of the actors involved in course planning may result in educational activities which are not timely. Courses which are not up to date are less useful for strengthening labour's interest representation, though.

8.2.4.1. Future Educational Activities

Which courses will be on offer is ultimately the result of participants' demand, what topics are perceived relevant by the trade unions and their educational staff, and the resources available.¹¹¹ Kubik (2015, email) wished that more seminars were offered that strengthened

¹¹¹ Probably, DGB BW will hence cancel 'climate change', because participants seem to have lost interest in this topic (Kubik, 2015, interview).

collective thinking towards social, political and economic change, instead of individual self-optimisation in the service of increased economic output. His dream is of a European regulation on paid educational leave that allows every EU citizen a minimum 10 days per year. The first week of these courses could be language training as preparation for the political discussions that could follow in the second. Through building Europe from the bottom-up, everyone has the chance and right to develop a European identity. This is not limited to travellers (Kubik, 2015, interview).

Verdi GPB has identified, together with the industry divisions, five educational areas which Michelbrink (2015, interview) suggests including in the future programme: inequality (discrimination, racism, xenophobia), capitalist crisis and actors (neoliberalism, privatisation), digitalisation and change in work (role of media in democracy, manipulation in the perception of reality), Europe between exclusion and inclusion (global justice, sustainability, access to resources), and fundamental social and human rights (egalitarian democracy, war and peace). Since members are not involved in the planning process, however, Michelbrink (2015, interview) wonders to what extent this selection really meets members' interests.

Particularly important for Verdi would be deliberation on values, because neoliberalism has altered them through increased alienation and separation/precariousness in society. Michelbrink (2015, interview) refers to a study of Tübingen University which found that solidarity would not be well-known among people below 35.¹¹² Moreover, he contends that many people had become resigned to the idea that justice in society is impossible. Therefore, questions like 'how much inequality can democracy take?' were raised at the last trade union congress.

Likewise important would be to explore how common interests can be developed. This was already difficult at national level, so how can it be achieved at supranational level? Apart from the examples of the ports, the Right2Water, Amazon and Telekom campaigns, Verdi members appear slow in their ability to take action and act (ibid).

In short, Verdi needs to improve labour's attitudes (values), knowledge (interests) and skills (action) in order to become fit for the future. Michelbrink (2015, interview) admits that Verdi lags behind in their education, especially with respect to values, due to a lack of resources.

No data from IGM have been collected in this respect.

¹¹² Michelbrink obviously means: Bibouche, S., Billmann, L., Held, J., Holbein, M., Kempf, M., Kröll, T. (2011) Was bewegt junge Menschen? Lebensführung und solidarisches Handeln junger Beschäftigter im Dienstleistungsbereich. Wiesbaden: VS Verlag für Sozialwissenschaften.

8.3.Challenges to (Transnational) Trade Union Education in Germany

Applying the analytical framework of part II, the factors challenging the development of transnational competencies may be related to *understanding trade union education*, the *pedagogical approach*, *resources* (human, material and socio-organisational) and *people* (union leaders, participants and competitors).

8.3.1. Understanding of Trade Union Education

As noted at the beginning of this chapter, at least since the beginning of the 20th century, trade union education in Germany has been influenced by a controversial discussion. Some have taken a narrow and functional view in which trade union education is seen as a tool for organisational capacity building. Others find this view too limited and have proposed to broaden it through a humanist perspective wherein trade union education also develops the potential of humans. Thus, whilst functionalists see trade union members as human resources, humanists consider trade union members full human beings who have more roles and purposes in life than improving trade unions' capacity. Adding to the functionalist view the humanist perspective would distinguish labour organisations from business organisations.

The century-long debate about the purpose of trade union education and the following questions about a top-down/indoctrinating and bottom-up/emancipating activation are, arguably, only symptoms of a much deeper issue – namely, hierarchy and power in institutionalised labour representation. What is the trade unions' conception of trade union education today?

For DGB BW (2010: 2), "education is an instrument for designing, self-determinedly, one's own life as well as social togetherness according to personal ideas and values" (author's translation). The seminars shall enable participants to act and deal with conflicts in the world of work. Therefore, certain knowledge and competencies are needed, which the BW provides. The BW sees itself as a service organisation that develops actively the participants' personal, professional, social and political interests as well as their values. It also introduces the DGB's organisational interests to them. In other words, the DGB BW strives to address the individual, the trade union and society. It remains open to question, however, how the DGB BW will to develop participants' values if only knowledge and competencies (head and hand) are developed whilst attitudes (the heart) are not explicitly concerned. Or does their concept of competencies include emotional and transformative competence?

For the Verdi GPB executive director, trade union education includes head, heart and hand in equal amounts. He describes education as an interconnection of *Wissen* (knowledge), *Wollen* (desire) and *Können* (ability) (Michelbrink, 2015, interview).

The service union as an organisation seems as clear in their understanding of trade union education. Verdi (2007: 17 author's translation) proposes that "skills and knowledge on economic and social connections from a trade union perspective" is not only core to labour education, but also the basis for deliberate and reasonable action. Moreover, skills and knowledge are apparently considered the sole requirement for achieving another aim, which is developing emancipated and confident members who arrive at common interests that lead to common action. At the same time, Verdi (2007: 17 author's translation) argues that deliberate and reasonable action needs members who are able to "combine knowledge, thinking, feeling and willingness". Where are members supposed to develop feeling and willingness from? Since Verdi does obviously not attend to attitudes in their education, the union seems to consider it the members' responsibility to grow appropriate attitudes themselves.

Then again, Verdi (2007: 9 author's translation) puts on the challenge to "show reasonable and justifiable values, visions", where the union refers to solidarity and equality. Verdi (ibid, author's translation) likewise suggests that its educational work puts at issue "democratic principles and fundamental values [...] as well as members' hopes and emotions". As mentioned earlier, the union has included in its educational programme topics which deal with "utopias and visions for a better world" (ibid, author's translation).

As a result, the meaning of attitudes in Verdi's understanding of trade union education cannot be clearly identified. Neither in theory, nor in the relation between theory and praxis seems the meaning of attitudes consistent. Why does Verdi not explicitly and as confidently as knowledge and skills include attitudes, i.e. the heart, in its fundamental understanding of labour education, if members' emotions and ideology seem so important to the union?

IGM (2014: 46) aspires autonomous and responsible human beings ("mündig"), yet limits 'Mündigkeit' to organisational concerns and social conflicts. More precisely, for the Metal Workers' Union, trade union education is "Zweckbildung" to form autonomous and political beings who act in accordance with the trade union's policies regarding conflicts at work and in society (ibid).

To achieve this compliance, education for officials (FunktionärInnen) and members is both a goal and task declared in §2 of IGM's statutes.¹¹³ Essential for IGM education is connected thinking and professional competencies. Taking a broader and deeper perspective and realising how issues in the world are related to each other ("erweiterter Weltaufschluss", ibid: 47) is facilitated through political education. Political education is also seen as a means to create

¹¹³ Satzung der IG Metall, 3rd Edition, February 2014, Frankfurt am Main. https://www.igmetall.de/internet/docs_4257762_IGM_Satzung_screen_e1588f09eddc914462821a9a3ef6c00aaa6136d.pdf, accessed 26 June 2015.

“concrete utopia” (ibid, author’s translation). Specialist knowledge, for instance in law, health and safety, collective bargaining, management of meetings, etc. is provided through respective other seminars. However, also specialist seminars are considered political education, since they would include the political dimension of the representatives’ and members’ daily issues (ibid).

Educational work is, thus, understood as a lifelong contributor to empowering both the organisation and individuals to act and interact in dialogue and to be assertive in corporate, social and political confrontations (ibid). In particular, five competencies are in the centre of the union’s educational work: professional, political, social, methodical and transnational. Regarding political competence, IGM draws on the concept of Negt (2010) (see chapter 4). More generally, the ability to develop utopias, adopt a critical attitude towards existing power relations as well as to deal with conflicts and take action are considered essential. All actions are to be oriented towards labour values and ideals, in particular “solidarity, social justice, vivid democracy and respect of dissidents” (IGM, 2014: 7 author’s translation).

Solidarity is understood as a feeling of commonness between equals which derives from the consciousness of common economic and social interests. This understanding contradicts Arnspenger and Varoufakis (2003: 161) who suggest that solidarity originates from the heart and soul, namely from the “generosity of spirit” (see chapter 2). The union assumes that the perception of ‘being equal’ poses the very challenge for international labour cooperation (IGM, 2014).

Overall, Verdi and IGM still view trade union education first and foremost in functional terms for the benefit of the union organisation. They seem to assume that the interests of the organisation equal the interests of its members. On this background, it becomes apparent why professional knowledge and skills training for national works/staff council members and other lay representatives and multipliers has remained the core educational business for Verdi, IGM and also DGB BW: these people are strategic instruments. Works councils and other representatives are the trade unions’ voice in companies – it is assumed that these people are trade union members. They can implement union organisational decisions, norms and goals in the workers’ heads (Kubik, 2015, interview). Moreover, works council members and other lay activists are a manageable quantity who maintain regular training. Political education is more symbolic and a building stone for the infrastructure of democracy (ibid). Whilst works council training is paid for by employers, political education is a loss-making business that requires both internal and external subsidies.

Thus, a paradigm change away from a functional towards a more organic view of trade union education, as suggested decades ago by Negt and other critical scholars, has not yet materialised. German trade unions seem to still consider themselves as collective bargaining machines as opposed to actors in a wider, eventually global social movement.

8.3.2. Pedagogical Approach

Following their self-presentation, the DGB BW (2010) appears to advocate a social constructivist approach to education. The BW concentrates on the provision of professional knowledge (Fachwissen) which is seen as being at the centre of successful learning in general and the improvement of the ability to act and solve problems in particular. Through knowledge, learners are supposed to create a "social and strategic imagination" which they need to identify "political and economic alternatives" (ibid: 4, author's translation). Social alternatives are not sought? Is knowledge really enough to be creative? Attitudes and skills seem forgotten. The BW proposes, yet, to work on participants' perceptions of values (p.2). Since the education of attitudes is not an explicit aim of the BW, however, value development seems to remain a byproduct of educational activities.

Strikingly, DGB BW (2010) does not refer to critical-emancipatory education. The transformative value of the knowledge distributed appears, hence, highly questionable. Some tutors seem to dislike the BW's disrespect of critical pedagogy: "education must enlighten", Gehrke (2015, interview, author's translation) argues.¹¹⁴ However, there is no official common agreement on the pursuit of critical-emancipatory education, neither between the BW and tutors nor between DGB and its affiliates (Kubik, 2015, interview). Therefore, so far, tutors apply more or less their own understanding of labour pedagogy (ibid).

However, change towards critical pedagogy seem in the making. A common pedagogical approach that commits to critique and emancipation was agreed upon at the DGB Educational Congress in January 2015. Especially, the Trade Union for Education and Science (GEW) pushed for an understanding of labour education that encourages a challenge to current circumstances instead of accepting them (Kubik, 2015, interview; Weber, 2015, interview). The new critical-emancipatory fundament received high consent among conference participants (Weber, 2015, interview). It was expected that tutors would not have difficulty translating theory into practice since they would be interested in transformative structural change, anyhow (ibid).

Methodological diversity is essential for DGB BW as well as methods that activate participants beyond group work. It is a huge challenge and needs a lot of the trainers' time and effort to choose interesting, active learning methods which are suitable to deliver the topic as realistically and as content-rich as possible. Since the teamers are often praised for their methodological skills, they apparently master this challenge very well. Indeed, among participants are usually some who would prefer to remain passive. But, as soon as a tutor manages to activate them, these participates eventually come to like active learning methods (Kubik, 2015, interview).

¹¹⁴ In original: "Bildung muss aufklären".

Political education seminars are not facilitated through online learning. The BW tried to integrate online learning in the area Computer & Media 10 years ago, but it required too many human resources. They might be able to reach additional people through online learning, but there has not been any demand ever since. Consequently, distance learning has never been considered, also because participants are still coming to the educational centre in Hattingen. Moreover, the colleagues in Hattingen prefer to meet their participants personally. However, MOOCs as a topic needs investigation (Kubik, 2015, interview).

Verdi (2007) follows an emancipatory and subject-oriented approach to education which aims at questioning power relations. Michelbrink (2015, interview) describes it furthermore as anti-authoritarian and diverse. According to the union's ideals of democracy and participation, individuals are facilitated in their self-responsible process of personal growth and autonomy in order to improve their ability to participate in society, be it at work, in politics, at home, etc. Therefore, teamers are supposed to match in cooperative 'Lehr-Lern-Prozesse' (teaching-learning processes) the course contents with participants' interests and ensure that they leave the seminar transformed (ibid).

In praxis, the aspired subject-orientation sometimes pushes teamers to their limits, because they would be more interested in security, i.e. following the seminar plan (ibid). The planned task of tutors is to "facilitate a critical debate [...] on individual and collective positions, provide new perspectives and broaden the ability to act in the daily praxis" (Verdi, 2007: 16 author's translation). Michelbrink (2015, interview) is however sceptical that tutors would fully put into practice the understanding of trade union education outlined in Verdi (2007). Rather, because of the challenge of aligning the interests of the union, teamers and participants, a lighter version would probably be applied (Michelbrink, 2015, interview). In order to ensure that trainers implement the organisational understanding of trade union education, Verdi could introduce some quality control measures, such as non-participant observers and recordings. Questionable is, however, whether Verdi's current human resources would be sufficient for taking on this additional task.

In fact, GPB terminated collaboration with certain trainers who 'lectured' too much. However, also "sendebewußte" teamer who pride themselves in not doing any 'games' have a "fan club" and are hence tolerated as a matter of diversity (Michelbrink, 2015, interview). Some participants indeed expect to be filled up with knowledge about what is allegedly right and wrong and find it problematic that tutors "don't have the answers" to problems (ibid). Rather lecturing tutors would conversely complain occasionally in their seminar reports that "too stupid" participants would not understand their (obviously too difficult) literature (ibid).

Teamers admit in their seminar reports that putting theory into practice can be very challenging. Realistically, the ability to act (Handlungsfähigkeit) cannot be evolved in 5 days

and be ready at Friday afternoon. Rather, Handlungsfähigkeit required more long-term work (ibid). The participants express in their course evaluations overall a quite high satisfaction with their learning experience (ibid).¹¹⁵

Michelbrink (2015, interview) takes a critical stance to e-learning. He doubts that political education, where building trust, human relations and communication is essential, can be taught through a computer. Attitudes respectively the values on which they base could possibly not be developed in an online course. 10 years ago, Verdi established a blended learning platform which was not well received by the participants, because questions can be solved in other ways than online. The GPB executive director is however aware of the e-learning trend, and he is open to consider ways of integrating it in order to not miss out on the move (ibid).

Michelbrink (2015, interview) is "a big fan of Oskar Negt". Due to the lack in resources, however, he believes that trade unions cannot fulfil the social mandate anymore which Negt has given to them. In addition, he reminds that trade unions are first and foremost organisations whose mandate it is to represent their members' interests. It follows that, in order to overcome the divisions within the European and global labour movement, trade unions had to change their members' interests from individual to more collective and from national to more global.

Like Verdi, IGM (2014) adopts a critical-emancipatory approach to education. For the union, critical-emancipatory education has four purposes. Learners shall be enlightened about capitalist exploitation and its wider connections; emancipate through developing utopias and behaving democratically and solidarily; self-critically analyse their entanglement in power relations and constraints which hamper freedom; create actions for resistance.

For so doing, IGM (2014: 11 author's translation) aims at developing "knowledge and skills so that interest representatives may evaluate and act competently and efficiently". The union's educational work shall furthermore "contribute to developing political benchmarks as well as an emotional bond between members/interest representatives and the union organisation". Therefore, trade union education for IGM always includes reflection on attitudes (Haltungen), because "individual attitudes are the basis of orientation, evaluation and motivation" (ibid: 22, author's translation). Negt (2010) as well as Wolfgang Klafki's concept of 'critical-constructive didactics' is mentioned as influential in trade union educational theory (ibid: 48).¹¹⁶

Equal to Verdi and DGB BW, the methodology at IGM is subject-oriented. The tutors' task is to create a space for learning that builds on the learners' existing knowledge and motivate

¹¹⁵ On a scale of 1 to 4, most participants evaluate the course between 1 and 2. However, Michelbrink (2015, interview) notes that evaluations are written in a positive mind-set at a Friday afternoon. Tutors usually receive excellent marks.

¹¹⁶ Wolfgang Klafki (*1927) is a German educational scientist. According to IGM (2014), his concept of 'critical-constructive didactics' includes critical reflection and emancipative action. Critical reflection and emancipative action is, likewise, an idea of Freire (2002).

participants to actively steer their learning process. Tutors assist participants in their learning process by structuring the educational activity in different phases, namely orientation, analysis, evaluation, and action. Moreover helpful is a language that uses images and sorting the discussion results. Discussion results may reveal participants' resistance and oppositions to certain issues which provide IGM with valuable information regarding the organisation as well as its mobilising capacity and public relations (IGM, 2014).

Michelbrink (2015, interview) argues however that, like in Verdi, subject-orientation is more theory than praxis. In reality, IGM would be more "stringent-authoritarian" than Verdi in providing teamers with educational guidelines.

In addition to subject-orientation, like Verdi and DGB BW, IGM methodology is geared towards initiating debates and impetus through a variety of action- and practice-oriented methods. In particular, pictographic, performing and literary methods are applied which serve as a model for action at work and in the union organisation. Interestingly, one method which may be applied at the end of EWC seminars is entitled 'Head – Heart – Hand' (ibid: 44).¹¹⁷. The methodological motto is 'from praxis, for praxis' (author's translation).¹¹⁸ Through asking participants to collect data themselves, they also 'learn how to learn'. Eventually, all 'Lehr-Lern-Prozesse' shall help participants to master their daily (political) praxis in the private and professional world more competently and successfully (IGM, 2014: 48). Blended learning is utilised too.

Successful seminars make participants reflect on their needs, interests and action patterns (IGM, 2014). Critical reflections about their current way of thinking are supposed to put participants in a state of crisis. Only in this state, old structures can be broken (this corresponds to chapter 3). Participants are then encouraged to see the solution to their personal crisis in a collective orientation (Kehrbaum, 2015, interview). Thus, participants are supposed to realise that democratic-decision making and solidary interaction are a more appropriate way to solve problems at work and in society than alone (IGM, 2014).

Therefore, successful seminars provide participants moreover with courage to leave their usual action patterns and confidence to take responsibility and collaborate in solidarity with IGM in order to represent members' interests. Participants are likewise encouraged to criticise and think in terms of alternatives and utopias. The knowledge which is needed to do so shall allow the learners furthermore to evaluate corporate and political processes. Successful seminars also enable the learner to apply the knowledge gained in the practice of workers' interest representation (IGM, 2014).

¹¹⁷ In this 'farewell exercise', the participants are asked to write down quickly what they will remember, what they have taken to their hearts and which advice they found useful. A fourth symbol shown are shaking hands, and it requires participants to tell their nationally typical expression to say 'good bye'.

¹¹⁸ In original: "aus der Praxis, für die Praxis" (IGM, 2014: 21).

All this may take some time, though, as “education needs time” where “the journey is the destination” (Kehrbaum, 2015, interview, author’s translation).

8.3.3. Resources

In addition to the understanding of trade union education and the pedagogical approach, educational activities are the product of several resources. Like for the ETUI Education Department, most of all *human, material* and *socio-organisational* resources appear to matter.

8.3.3.1. Human Resources: Educational Staff

DGB BW has between 130 and 140 full-time staff in their three educational centres, which include 32 educational officers (Bildungsreferenten) (DGB BW, 2010; Lehmann, 2014). Most seminars are held by about 260 external trainers, who usually run up to 3 seminars per year (Lehmann, 2014). None of them could hold a seminar in English, maybe one would be proficient in French (Kubik, 2015, interview). In other words, BW staff is not equipped for offering transnational educational activities outside the German speaking world.

As mentioned earlier, the BW calls their trainers Teamers to capture the idea of team and thus equality between teacher and learner. The idea of team seems however not apply to the relation between the BW and trainers. Soon after German unification, the BW started outsourcing their tutors by taking advantage of the many qualified yet unemployed teachers from East Germany. Among the freelance trainers today are volunteers like students who train to co-finance their studies, works council members and Vertrauensleute who train besides their job and pensioners who train by conviction. Due to outsourcing, the BW has become like a school that consists of management, administration and canteen. The teachers do neither belong to the school, nor are they invited to school meetings (Gehrke, 2015, interview).

As a consequence, DGB BW has reduced the number of employees who may feel associated with their employer and want to get involved in fundamental internal issues (ibid). Likewise decreased has been the number of staff with time and money to follow a topic continuously, develop seminars methodologically rich, answer participants’ queries competently as an expert of the field and be active in the topic’s networks (ibid). Some trainers may have expert knowledge, but lack in pedagogical value.¹¹⁹ Eventually, through outsourcing their trainers, the BW has lost field expertise, depth in knowledge and motivation among teamers (Kubik, 2015, interview). This means, too, that the BW has lost competitiveness on the labour educational market.

¹¹⁹ In order to meet DGB BW pedagogical demands, trainers must at least have completed 15 seminars (Kubik, 2015, interview). Given that trainers provide up to 3 seminars per year, fully qualified trainers are available only after 5 years of collaboration with DGB BW. Do freelancers stay that long? Given the high competition from private consultancies, can the BW afford 5 years until a trainer is up to speed?

Dissociation and demotivation can arise, moreover, by knowing that long-term collaboration of several years can be terminated very easily and instantly, even impersonally by email as Lehmann (2014) reports. Also unfavourable is that the BW pays only a fraction of the up to €1,000 which private consultants may ask for a day. For political education seminars, teamers are compensated with €350 daily, excluding pre- and post-preparation, and compensation has stagnated since 10 years.¹²⁰ Accommodation and meals are usually not included either, but charged with a flat rate. In the Berlin-Brandenburg regional educational centre, youth seminar teamers are compensated with €100 per day (ibid).

It follows that DGB BW has, as an employer, been copying, for at least two decades, neoliberal capitalist behaviour, and has thus undermined labour's participation and co-determination in organisational decision-making. DGB and BW leaders seem to violate the very principles and exploit precarious working conditions which union members pay them to fight for and against.

To stop this development, the BW teamers founded an interest association approximately four years ago which fights for the recognition of freelancers. The body can celebrate first successes: teamers must be informed about organisational decisions. The co-determination policy regarding redundancy makes it now impossible to dismiss a teamer unilaterally by email. Another policy describes a procedure for labour conflicts. Their next project concerns salary (Gehrke, 2015, interview).

Verdi GPB has available around 150 tutors at the federal level and, overall, about 1,000 (Michelbrink, 2015, interview). Some tutors hold only 1 or 2 seminars per year. The quantity seems enough. However, Michelbrink is looking for more quality. He perceives it difficult to find trainers who are fit in both economic policy and emancipatory/subject-oriented pedagogy. Opening seminars to people from other European countries would require additional intercultural competence and languages. Apart from Michelbrink (2015, interview), no tutor would have the respective proficiency in English.

Like DGB BW, Verdi calls their trainers Teamers. Most of them are males aged 50-60 plus, like GPB's participants. Every seminar is held by two teamers who should ideally be a man and a woman. Due to the majority of males, however, this is not a reality. The reality is that freelancers like academics, lawyers and lay tutors who provide seminars besides their work, may find it difficult to be released by their employer (ibid). Moreover characteristic for scholars and lawyers is that they do usually not take a student-centred approach to teaching, but rather lecture the course participants. In addition, like trade union secretaries, most of them are

¹²⁰ Similarly in Brussels, the ETUI has been paying a "solidarity compensation" for trainers of €300 per day since about 15 years (Garrido, 2015, email). Trade unions in other countries must value their trainers differently, though: "a trainer of the national confederation costs three times or more on the majority of the countries" (ibid).

“beratungsresistent” (advice-resistant) in terms of further education, because they view themselves as experts already (ibid). As in DGB, a culture of further education lacks among trade union staff (Michelbrink, 2015, interview).

Lay teamers are paid €100 per day, where professional teamers receive between €275 and €475, usually around €375. Besides collaboration with tutors, Verdi employs 10 managers and 15 secretaries in the educational centres (ibid).

Of around 250 people working in the IGM educational centres, roughly 60 are educators (Bildungsreferenten) (IGM, 2014; Kehrbaum, 2015, interview). Seminars may also be held by trade union officials, approximately 1,300 lay representatives as well as external trainers. Since the lay representatives are not qualified pedagogues, IGM pays special attention to their further education (IGM, 2014).

8.3.3.2. Material Resources: Finance and Educational Centres

German trade unions have access to a number of different financial resources in order to fund their educational activities, which can be divided in resources external and internal to the trade union. Externally, German trade unions can receive grants from German and European governments. Moreover, German co-determination laws oblige employers to fund the education workers’ representatives need to perform their function in the firm or public sector organisation. Internally, affiliation fees and participants’ course contributions are the major sources of income for educational activities.

8.3.3.2.1. External Finance

Regarding political education, DGB BW is funded through four avenues by three institutional sponsors. Firstly, the department receives around €180,000 annually from the Federal Agency for Political Education (bpb). The bpb pays €50 per day per participant. This is an increase of 56% compared to an earlier rate of €32. The money is sufficient for 40 to 50 seminars. Secondly, the Land North Rhine-Westphalia donates between €120,000 to 130,000 per year. This amount can cover up to 75% of a full-time position in an educational centre. Both bpb and the Land may fund projects, for example, on World War I. The Federal Ministry for Economic Cooperation and Development (BMZ) supports development education and, hence, seminars on hunger and climate change, among others. The BMZ gives €60 per day per participant. European funding was used for study trips until approximately the year 2000, when the conditions of application changed. The EU has come to prefer bigger projects from €150,000 involving multiple partners. The BW finds it difficult to meet this bigger project scale for the additional personnel it would require, and considers entering this space not worth the effort. The amount received from EU funding was not much, anyhow (Kubik, 2015, interview).

Kubik does not feel constrained much by the conditions on which bpb provides funding. If DGB BW had to divert too much from its understanding of political education in terms of content, they would stop applying (ibid).

Verdi has four areas of educational income: investment, which are education and training for employees' representatives, political education for all members and non-members, education for trade union staff, and train the trainer seminars (Michelbrink, 2015, interview). The first two areas are sponsored directly and indirectly by the employers, whereas the latter two are financed internally.

The biggest area concerns the employer-financed work of Verdi b+b, which spends approximately €4-5 million per year on facilitating workers' representatives in the companies. Political education has an annual budget of about €2 to €2.5 million at the federal level, whereof roughly €100,000-150,000 is invested in European/international educational activities (i.e., 5-6%. The annual budget originates from Verdi members in Supervisory Boards who are obliged, through a decision by the DGB in November 2005, to share parts of their remuneration with the Hans Böckler Foundation (HBS) and other acknowledged organisations (Abführung von Aufsichtsratsvergütungen).¹²¹ Thus, GPB receives 20% of the allotted share whilst 80% goes to the HBS. Verdi spends roughly €500.000 on education for trade union staff at the local (Bezirk), regional (Länder) and federal (Bund) levels. Approximately €200,000 is invested in train the trainer seminars which are held for both external freelancers and internal tutors.

Besides the contributions from Supervisory Board members, Verdi receives money from bpb, the state agency for political education, like DGB BW. bpb has reduced their support from €110,000-120,000 to €90,000 currently (ibid). The reduction of funds is assumed to be part of a more general trend towards project-based finance, on the one hand.¹²² On the other, Verdi appears to have some difficulties with bpb regarding the understanding of critical political education. The bpb rejected funding for the 5-day educational activity 'All power to the markets? Criticising and overcoming a neoliberal credo' (author's translation), which took place in the educational centre in Undeloh in January 2015.¹²³ The bpb criticises the lack of more neutrality in the evaluation of neoliberalism. It argues that the seminar painted a too negative picture of neoliberal theory and ideology instead of discussing it more controversially. The bpb suggested roleplaying the arguments from proponents like Friedrich Hayek and Thomas Friedman in front of the plenum, as opposed to merely presenting them. Through this "forced

¹²¹ If stock prices increase, so do the Boards' contributions. Also the trend to increase the number of European Companies (SEs) would impact favourably on GPB's educational budget (Michelbrink, 2015, interview).

¹²² Topics like racism and right-wing extremism would be seen by external sponsors rather as projects than political education. Michelbrink (2015, interview) wonders who would attend suchlike workshops? A seminar solely on racism, for instance, would neither attract people, nor invite those who are actually involved. Political education, to the contrary, would work at the roots of racist attitudes.

¹²³ Unpublished letter from bpb to the DGB BW Düsseldorf from 3 March 2015, 13 pages, provided by Michelbrink on 10 April 2015. (Interestingly, Verdi GPB is mentioned here as a member of the umbrella organisation DGB BW.)

more intensive consideration of the topic and potential positive effects" (p. 13, author's translation), the seminar would, in the future, fulfil the condition of being 'more controversial'.

In other words, in a way that fully contradicts the Verdi's subject-oriented approach to education, the bpb tries to force labour to explore the benefits of neoliberalism. Thus, critical political education is steered towards becoming less critical. This direction of political education opposes, furthermore, Verdi's educational aim to facilitate critical and alternative perspectives to current power relations and values in society, which are dominated by a "neoliberal mainstream" (Verdi, 2007: 11).

As DGB BW, Verdi GPB seems, however, not in a needy position: "it would not be a big problem if bpb money ceased" (Michelbrink, 2015, interview, author's translation).

GPB does not engage in European funding due to a lack of qualified and experienced staff as well as union structures that would promote such investment (Michelbrink, 2015, interview).

8.3.3.2.2. Internal Finance

In addition to external funding, trade union education in Germany is subsidised internally through course and membership fees.

8.3.3.2.2.1. Course Fees

According to § 37,6 Works Constitution Act (Betriebsverfassungsgesetz, BetrVG), employers are obliged to cover works council members and other labour representatives in attending educational activities which are "necessary" to fulfil their roles. For all other trade union members, Verdi and IGM pay the seminar fees. DGB BW courses are not free of charge for members.

Like ETUI fees, seminar fees for political education in Germany are contributions which are far from cost covering. As mentioned before, political education is a 'Zuschussgeschäft' (loss-making business) for trade unions and needs subsidising. Seemingly, the DGB BW – as much as Verdi and IGM – has lost its financial power to subsidise political education over the years. In 1994, educational leave seminars were free for DGB members whilst non-members had to pay 100 DM (€51.13) per week. Today, educational leave seminars start at €150 and may go up to €290 for 'Europe for Beginners'. Increased prices are usually due to excursions.

Unemployed participants get a discount between 40% and 60% depending on their income, yet people with low incomes may not be able to afford the contributions and related travel costs. Some Verdi members would not attend DGB BW educational leave seminars, because they have to pay for it (Gehrke, 2015, interview). The fee structure may, therefore, act as a form of social selection. The people implicitly selected would be 'Bildungsbürger'. Educated citizens who are likely to have a higher salary and to invest in their further education (Kubik, 2015, interview).

Non-trade union members are also welcome to participate in the educational activities from DGB BW, Verdi and IGM. They are charged more (DGB BW, plus €40 per day in Hattingen and €60 anywhere else) or must pay full fees (Verdi, IGM). For a political education seminar, non-Verdi members have to pay €825. IGM charges non-members between €702 (3 days) and €2,705.60 (2 weeks), depending on the length of the seminar and its location.

8.3.3.2.2. Educational Centres

DGB, Verdi and IGM divert a certain amount of membership fees for maintaining their educational centres.¹²⁴ Whereas Verdi has agreed a stable percentage, the amount fluctuates at DGB and IGM.

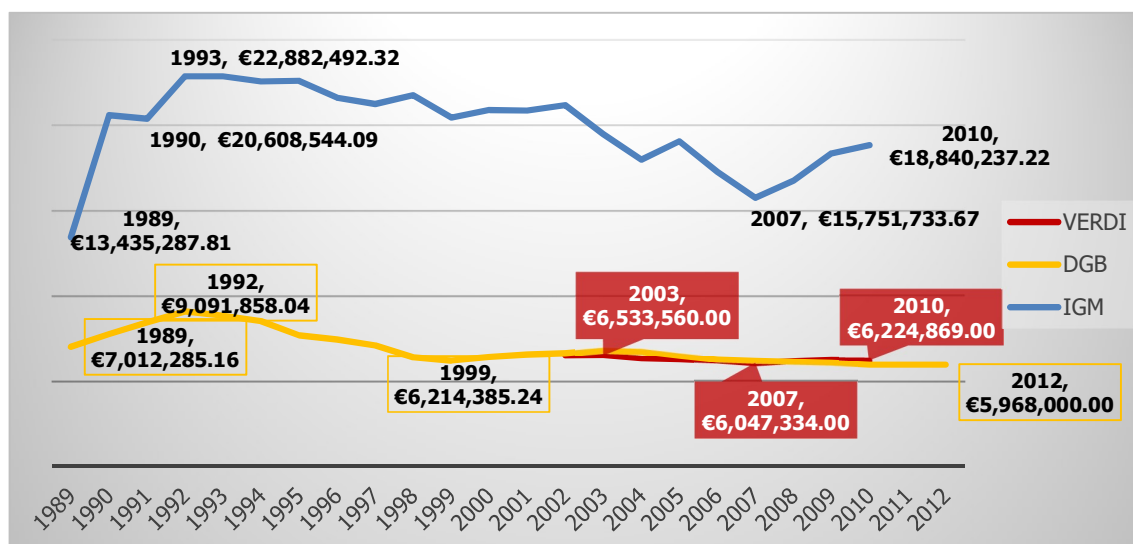
Verdi invested a flat rate of 1.5%, at the least, between 2002 and 2010. As opposed to Michelbrink's (2015, interview) proposal to increase this amount to 5%, union leadership has reduced it to 1.39% since the finance department believes that "there are more important things than political education. For €2 million, about 20 secretaries may be employed who can take care of companies" (ibid, author's translation). Finance has difficulty appreciating education for the purpose of developing values because its impact cannot be expressed in numbers (ibid). Arguably, however, what makes us human and is eventually crucial for mobilising members cannot be measured like production output, savings and other quantifiable results.

The DGB was once the most generous investor, with 6.3% in 1990. A general downward trend brought this figure to a low of 4% in 2012 (Figure 8-2).

Likewise, IGM was the most open-handed in 1995, when 5.7% of membership fees was spent on educational centres. This came to a low of 3.7% in 2007. Since then, the trend in de-investment appears converted, as it rose to 4.3% in 2010. Generally striking is that IGM invests three times more in their educational centres than Verdi and DGB (Figure 8-2). Overall, "approximately 6% of total membership fees are invested in trade union education" (IGM, 2014: 11 author's translation). Considering fees of €441,742,337.40 in 2010 (IGM annual report 2007-10), this would be €26,504,540.24 per year.

¹²⁴ According to the respective annual reports, in 2010, Verdi had income from membership fees of €414,500 whilst IGM received €441,742,337.40. DGB got from their affiliates €149,704,213.71 in 2012.

Figure 8-2: **DGB, Verdi and IGM: Annual Investment in Educational Centres**



Source: DGB (1989-2012), Verdi (2002-2010) and IGM (1989-2010) annual reports; own illustration

Since 1990, DGB BW has closed 6 educational centres due to financial reasons (Girndt, 2011) as a result of the membership crisis (Gehrke, 2015, interview). One of the six centres was the 'Haus der Gewerkschaftsjugend' in Oberursel, which was a pioneer in international political education for trade union youth. Due to upcoming millions in maintenance and required annual subsidies, the previous DGB BW Executive Director, Dieter Eich, closed the educational centre in Hamburg-Sasel and sold the facility in Niederpöcking-Starnberg to IG Metall in 2011.¹²⁵ Meanwhile, IGM plans to build a new meeting and conference hotel on their recently acquired lakefront property in Bavaria (Böhm-Haimerl, 2015).

Thus, besides in hotels, most DGB BW educational activities take place in one of the three remaining locations. The main educational centre is in Hattingen and consists of two houses, one for political adult education and the other for youth education.¹²⁶ Hattingen is a full centre with accommodation, seminar rooms, a canteen, a bar and leisure facilities. Hamburg-Besenbinderhof is the domain for works council and other representation training and consists of seminar rooms and catering. In Düsseldorf are available meeting rooms which belong to DGB BW headquarters. In-house seminars take place in companies and other organisational clients.

Besides Niederpöcking, IGM owns 7 more educational centres around Germany, which are in Berlin, Lohr, Beverungen, Inzell, Bad Orb and Schliersee (IGM, 2014). The main centre in

¹²⁵ The others are Springe (1993), Radebeul (1995), Bad Kreuznach (1997), Oberursel (2004).

¹²⁶ Hattingen had the reputation of "Kaderschmiede" (cadre/elite training) and "intellectual pool" (Gehrke, 2015, interview), not least because of the Hattinger Kreis (Hattingen Circle) which between 1987 and 2010 critically analysed trade union policy and suggested improvements for the future of trade unions and their education (see Mückenberger & Schmidt, 2011).

Sprockhövel is very close to the DGB BW. Seminars may also take place onsite the company, in local branches and in rented venues (ibid).

At the federal level, Verdi (2007) owns 9 educational centres (Berlin, Bielefeld, Brannenburg, Gladenbach, Lage-Hörste, Mosbach, Naumburg, Undeloh, Walsrode). The occupation rate fluctuates considerably, but is, on average, about 45%. This rate can be compared to those of hotels and is considered "good" (Michelbrink, 2015, interview). The tenth centre in Saalfeld is rented together with the Austrian ÖGB, and the lease was just renewed for 2 more years (ibid).

To the contrary, the Verdi Federal Board decided on 11 May 2015 to close the 61-year labour education history of Lage-Hörste on 31 December 2015 and, hence, the working environment of 25 staff and several Teamers.¹²⁷ The Board refuses to invest €3.5 million in fire prevention upgrades. The centre's association of friends and sponsors accuses the Board of the very profit-maximising behaviour which the centre has aimed at challenging in its daily educational work, amongst others, for works council members.¹²⁸

At the level of Länder, also regarding b+b, about 60% of educational activities take place in hotels. For 2-3 day courses, a central location is more convenient for participants (Michelbrink, 2015, interview). Hotels may also be booked if educational centres are fully occupied (ibid). Michelbrink regrets that no educational locations are outside Germany, except for the very limited number of courses which include a cross-border trip.

8.3.3.3. Socio-organisational Resources: Transnational Partners, Networks and Networking Events

DGB BW Political Education collaborates with ÖGB in that DGB members can participate in the ÖGB's activities for free. In turn, ÖGB members may participate in DGB BW seminars, yet they rarely cross the border to Germany. The North-South Net now has a permanent office in Brazil whereby international collaboration may develop further (Kubik, 2015, interview). The BW does not have any advisory structure, but it would surely benefit from one like the Hattinger Circle (Kubik, 2015, interview).

DGB teamer Gehrke (2015, interview) collaborates a lot with IGM Arbeitskreis Internationales (IGM international working group). This is an autonomous grass-roots group which receives funding from the IGM Board yet is not connected to it. Amongst others, the Arbeitskreis works together with the British/Irish union UNITE. The networks which teamers bring to the BW are very fruitful (Kubik, 2015, interview).

¹²⁷ Verein der Freunde und Förderer der Bildungsstätte Lage-Hörste (2015) Bildungsstätte Lage-Hörste wird geschlossen, <http://dju-nrw.verdi.de/dju-vor-ort/dju-owl/2015-2/++co++902b3a0a-f8ee-11e4-9385-525400a933ef>, accessed 28 June 2015.

¹²⁸ ibid.

The political education department does not host any events inviting people from other countries because such events would not be externally sponsored (Kubik, 2015, email).

The Verdi GPB Executive director maintains collaboration across borders. Besides with the ETUI, he collaborates with the ÖGB and the Austrian Chamber of Labour, as they are well resourced. Collaboration with the British public services union UNISON has been in decline ("brökelt"). He would like to develop relationships with the OPZZ and other Polish trade unions. However, from any of such activities, no joint actions follow. Everything remains rather superficial (Michelbrink, 2015, interview).

As a result, Verdi's transnational educational collaboration originates more from Michelbrink's (2015, interview) individual commitment than from organisational demands. He usually has to justify transnational investments, since they are not considered relevant for Verdi's national core educational business. Rhetorically, Verdi leadership would attach a high priority to international work. Practically, however, like the European Federations (see chapter 7), Verdi has "no systematic strategy regarding trade union education at the European level" (Michelbrink, 2015, interview). European labour education would be more a long-term perspective which would be dealt with once everything else works fine (ibid). In other words, the national level must work before the services union will increase investment in transnational trade union education. Verdi's leaders seem to miss that the national level may be improved through cross-border collaboration.

Generally, German trade unions ask themselves for what reasons they should invest in transnational collaboration? They perceive themselves still quite strong (ibid). For solidarity? Michelbrink laughed: "nice ideal" (ibid). He referred to studies that show that solidarity is rarely a reason to join a trade union. Interestingly, Michelbrink's definition of solidarity – in other words, the belief that I can serve my self-interest best through others – does not correspond to the one outlined in chapter 2.

Furthermore, (German) trade unions may circumvent the diversity of attitudes in Europe and, hence, the effort to discuss them. Trade unions prefer to retreat to indisputable matters, and this is national interest representation (Michelbrink, 2015, interview). However, the crisis would have shown that national trade unions have to enter the European terrain and, for instance, interfere in finance and tax policy. There is a big gap between the European and the local levels, though, and the huge challenge for trade union education is to bridge this gap: workers need explained to them what impact European decision-making has on their local interests because they want a feeling of how, concretely, they can make a difference (ibid).¹²⁹

¹²⁹ For example, say, there was a course on Juncker's Investment Plan. The participants would like to know what consequence the Plan might have on their jobs. What will participants do with this knowledge, though? Once the course participants knew that Juncker's plan still follows the neoliberal agenda of growth and investment and that the European trade unions might agree to the plan nonetheless, the course participants might become frustrated.

Due to the distance to Brussels as well as the neoliberal hardliners there, transformative impact appears to require hard work. How many trade union members in Germany are ready to make this effort?

8.3.3.3.1. Collaboration with the ETUI

The ETUI programme is not (yet) connected, neither to DGB BW Political Education nor to other BW streams. The DGB BW executive director has identified several reasons why a connection between BW and ETUI is difficult (Meyer, 2015, email). ETUI and German trade unions have a different understanding of trade union education, so that their aims and target groups differ. The ETUI programme would target mainly trade union staff (Hauptamtliche), on the one hand, and trainers, on the other. However, as mentioned earlier, neither does the BW engage in train the trainer activities, nor is the vast majority of trainer trainers employed by the confederation. Quite the opposite, education for DGB staff is part of the personnel development process which staff can co-determine. Meyer also points to the above mentioned agreement between DGB and its affiliates that the BW does not interfere in the qualification of works councils and other lay representatives in the firm. It remains to be seen what solutions Meyer and Garrido have come up with.

Verdi collaborates with the ETUI through the DGB BW executive director Claudia Meyer, basically since Garrido has been in office (Michelbrink, 2015, interview). From 10-12 February 2015, Verdi hosted, in its Berlin educational centre, a workshop on 'Trade union adult education experiences, current practices, objectives, self-concepts' together with the ETUI, which was the second joint activity (ibid).

Michelbrink (2015, interview) acknowledges that the current ETUI education director endeavours to consider the national unions' needs and integrate them into decision-making about the topics offered (see chapter 6). ETUI Education now has "an entirely different quality", which he appreciates very much (ibid).

During the term of the previous education director, Georges Schnell, Michelbrink (2015, interview) had attended some language and Project Management courses. He also forwarded the ETUI's course announcements and sent some participants to attend. However, Michelbrink's relation to Schnell was quite poor. The Verdi GPB executive director argues that, unlike Garrido, Schnell did not care about the national trade unions' education requirements (ibid).

Verdi GPB does not want to frustrate their participants, however, for they would fear that (potential) participants would not take up courses (again). To the contrary, courses on health and safety, such as reducing stress, and other topics that are close to the company would be much easier to get across, as the success for participants is usually much more tangible (Michelbrink, 2015, interview). Fear, however, is a bad advisor for decision-making, as we remember the GM Opel EWC vice-chair advocating in chapter 2.

In other words, during the Schnell era, the national unions had a voice, but their voice was not heard. At the same time, the national unions would have often failed in making their voice heard when they sent to the ETUI committees not necessarily the most able people (ibid, see also Linder and Rößler in chapter 2).

Despite the improvement of ETUI Education since Garrido has taken over from Schnell, German trade unions have been reluctant to collaborate with their Brussels colleagues because the meaningfulness of the collaboration does not appear immediately clear (Michelbrink, 2015, interview). Due to national differences, national education might be more useful. Yet, exchanging union activists in the firms (Multiplikatoren) could be beneficial (ibid). Moreover, Michelbrink is still unsure what the purpose of ETUI education is. The Department could focus on practical topics without proposing a big picture (ibid). At the same time, it seems difficult to create a big picture. A common understanding of what trade unions (should) do at European level would be missing (ibid).

Like Meyer, Michelbrink finds it difficult to forward ETUI course announcements due to the lack of strategic clarity and confusion about the target group of ETUI educational activities (ibid).

In sum, several factors hamper the ETUI and German trade unions from increasing their collaboration. These are, as part I suggests, due to structures inside and outside the trade union organisations, the relations between people as well as their perceptions of meaningfulness. However, from the point of view of ETUI Education, the collaboration with German trade unions has improved, and the Education director seems eager to increase it:

Regarding "Germany [...] it would be interesting to go deeply on the question [of collaboration], but [... the] DGB has different organizations working on education; the concept of TU education is not really the same and not totally adjusted to the rest; the [affiliates] have a very very important work on [education]; and we are progressing: after years and years near the zero, last years we progress a lot, having on the program courses proposed by DGB, having DGB trainers, having EDU activities on their training centers; having an active and responsible member on tour Pedagogical Committee [i.e. Claudia Meyer] and, finally, having this year in November the EDU DAY and the EDU CONFerence in Berlin" (Garrido, 2015, email).

8.3.4. People

8.3.4.1. Union Leaders

Like structures, resources and relations, educational activities are the product of leaders' behaviour and decisions. For this reason, this section analyses union leaders' support for them.

Michael Sommer, DGB Chair 2002-2014, has reduced investment in education without putting it to debate (Gehrke, 2015, interview). Indeed, the share of membership fees that was dedicated to DGB educational centres decreased continuously from 4.7% in 2004 to 4% in 2012 (DGB, 2006, 2010, 2014). The newly elected Chair, Reiner Hoffmann, appears committed to changing his predecessor's course. Hoffmann advocated, in the podium discussion at the conference on 'Old fundamentals and new orientations in trade union education'¹³⁰ held in Hattingen on 3 September 2014, that trade union education must be integrated in the organisational strategy and provided with money (Gehrke, 2015, interview). This indicates, conversely, that education has hitherto not been part of the DGB strategy and that trade union education might have remained underinvested.

Claudia Meyer has been DGB BW executive director since November 2011. In her first two years, she was busy consolidating the BW after workers had revolted against the closure of the two educational centres in 2011. A series of successful lawsuits for reinstatement came in very expensively for the BW and challenged the existence of the organisation (Gehrke, 2015, interview). Through more closeness to the DGB, Meyer now tries to turn red figures into black ones (Kubik, 2015, interview). Matthias Anbuhl (2015, interview), Head of the Department Education and Qualification Policy at DGB, confirms this closer collaboration with the BW. Before Meyer's term, he perceived the BW as quite distant.

Indeed, Eich aimed to remain autonomous, at least financially. In office from 1990, his goal was to create a BW that is self-sufficient. Therefore, on a positive note, he promoted project work and funding. Even though projects are limited in duration, investment in them has given the BW a better presence on the labour educational market. Through focusing strongly on cost-benefit calculation, however, Eich directed his view away from integrating education into trade union strategy (Kubik, 2015, interview). In relation to the earlier discussion on the predominantly functionalist understanding of trade union education, for Eich, a utilitarian view of education and organisational management is, indeed, most important.

¹³⁰ The conference was organised to honour the 80th birthday and efforts of Hinrich Oetjen, 1970-1983 Director of the DGB Youth educational centre in Oberursel (closed at the end of 2004), Director of DGB educational centre Hattingen (1984-1995) and member of the Hattinger Kreis (see Mückenberger & Schmidt (2011) on Hattinger Kreis). Oetjen tried to implement Oskar Negt's concepts of trade union education (Gehrke, 2015, interview).

8.3.4.2. *Participants*

Blue-collar workers (Gewerbliche) rarely attend political education seminars. Rather, it is white collar workers (Angestellte) who take educational leave. They see the leave as an opportunity to get out of work and in contact with other people from different worlds of work. Moreover, white collar workers are usually higher educated and have, thus, a higher salary. Therefore, they may have less difficulty affording seminar fees (Gehrke, 2015, interview).

However, since Verdi and IGM offer their courses free for members, seminar fees cannot be the major reason why blue-collar workers seldom utilise their right to educational leave. Rather, those workers who are higher-educated already maintain their interest and priority in (political) further education ('Bildungsbürger') while those who actually need to expand their education do obviously not consider it a priority.

Statistically, this statement cannot be fully underpinned, however. The average participant in political adult education at DGB BW is, indeed, a white collar worker, but one who does not have a university degree (Kubik, 2015, interview). Just over a third of participants between 2012 and 2014 had an academic degree. The remaining two thirds were different school leavers. Thereof, the number of Junior Certificates (Realschüler) was roughly double the number of Leaving Certificates (Abiturienten) and Basic Leaving Certificates (Hauptschüler) (Kubik, 2015). It remains unclear, however, which of these school leavers had progressed to a state-recognised apprenticeship because the BW software has, so far, not accounted for this.

DGB BW Political Education participants are mostly from former West Germany (Kubik, 2015), and educational leave is not as prominent in the former East. Moreover, the number of unemployed people is higher in the East, and they are not eligible for educational leave (Kubik, 2015, interview). Interesting, too, is that even a few workers from the three Länder which do not have a respective laws in place attend DGB BW education leave courses (Kubik, 2015), which may be covered by their collective agreements (Kubik, 2015, interview). In general, 60-70% of political education participants return to the BW (ibid).

In 2013, 92.6% of DGB BW Political Education participants were members of a DGB affiliate (Kubik, 2015). Although DGB BW, Verdi and IGM courses are open to non-trade unionists, this group seems to take educational leave mostly outside the labour movement, if at all. Exceptionally, social activists from Greenpeace (regarding climate change) and like organisations come to Hattingen. Gehrke (2015, interview) wished that political education participants were increasingly from outside the labour movement, especially from important social movements like Blockupy. However, DGB structures seem too fossilised. The suggestion has gone unheeded at the Board level. Kubik (2015, interview) confirms that the DGB BW executive director seems unprepared to strengthen the link to social movements and prefers to continue targeting trade unionists.

Educational leavers come to transnational courses without any prior knowledge of other countries or understanding of Europe. They assume that other countries work like Germany and ask, for example, about works councils in Poland. Educational leavers are not aware of how dependent on EU structures they are. In the media, terms flash by without having any meaning for people. It is only in the seminars where participants learn how (un)democratic the EU is and how they themselves contribute to it. Thus, seminars are required to establish basic knowledge between countries and to form a basis for excursions, which are part of some seminars. Working class households (*Arbeiterhaushalte*) would usually not proactively search on Google about things, like the European institutions, which they perceive to have no influence in (Gehrke, 2015, interview).

Seminars for works councils are the opposite. Here, we can find, besides more senior representatives, younger employees who are committed to their professions and representative roles (*ibid*).

In sum, the participants in trade unions' political education are white-collar workers without university degrees who take educational leave. The vast majority stem from the former West and, as mentioned earlier, is above age 50. Participants in employer-financed labour representative training also include younger trade union members who are eager to fulfil their voluntary roles.

Whether works council members are committed to expanding employees' representation to supranational level may be inferred from trade unions' activities in EWC training. In addition, EWCs are probably the most prominent and legally underpinned form of transnational labour collaboration. Therefore, the following section analyses German trade unions' efforts regarding EWC training.¹³¹

8.3.4.2.1. Selection of Participants

The four core educational areas of DGB BW target different participants, since all of them are assumed to have a different orientation to act (*Handlungsorientierung*): works council members, active union members (*Vertrauensleute*) educational leavers (*Bildungsurlauber*), youth and apprentice representatives (*JAVler*), trade union members without any function (youth: up to age 27), and multipliers like trainers/activists (*Multiplikatoren*). Thus, DGB BW education focuses on voluntary labour representatives (*Ehrenamtliche*) and trade union members. What makes BW courses special is their audience from various sectors, professions and social milieus (Kubik, 2015, interview).

More than 19,000 participants per year participate in educational activities organised by DGB BW (2010). Thus, the BW facilitates learning for roughly 0.3% of membership. A little

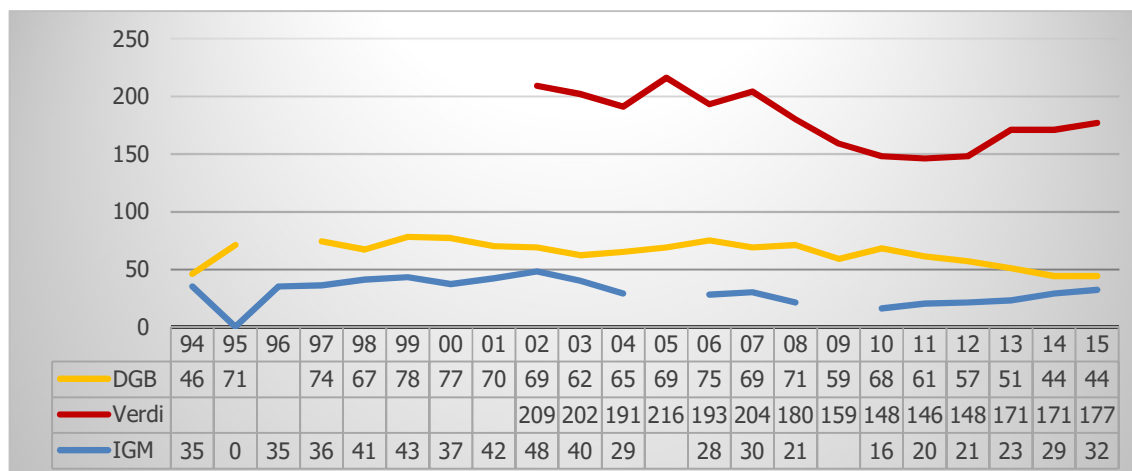
¹³¹ In speech, EWC trainings may be referred to as '*Gremienschulungen*' (training of representative bodies). Depending on the context, however, '*Gremienschulung*' can mean national works councils, too.

group of 574 (3%) accounted for the area of political adult education, including digital communication and media, in 2014. Since a peak in 2003, this number has fallen by nearly two thirds from 1,422 (Kubik, 2015). Political adult education alone has declined from 752 participants in 2003 to 425 in 2014 (ibid). One reason for the drop in participants is that less people are interested in spending their educational leave discussing political and social issues. The average number of participants in a course has diminished from 17 in 2008 to 13 in 2014 (Kubik, 2015). At the same time, the BW has reduced the maximum number of course participants, from 18 to 15 today, because political education is a loss-making business; so, the fewer participants, the less loss (Gehrke, 2015, interview).

What if DGB and other trade unions suspended political education seminars, since they are a financial burden? Kubik (2015, interview) suggests that political education is an important achievement by trade unions. If they cancelled it, trade unions would renounce dialogical communication with their members and a bottom-up organisational culture. It was vital for democracy to create spaces outside everyday life to deliberate about all kinds of social and political problems – and the labour movement must always do something for democracy. The DGB BW executive director is not against political education, yet her praxis to save the stream appears slightly questionable (Gehrke, 2015, interview).

The BW has responded to the loss from the Political Education stream by decreasing the number of courses. The number of national and European political education seminars in 2015 (36) has reached below the level of 1994 (41). Contrarily, the number of global political education courses offered on the basis of the North-South Net has experienced a slight upward trend. Especially, the global economic crisis appears to have increased interest in international topics between 2008 and 2013. Whilst Verdi and IGM have experienced a downward trend like the DGB BW's, a new upswing in the number of political education seminars is visible since 2010. Generally, Verdi's amount of political education offerings today is four and five times bigger than that of DGB BW and IGM (Figure 8-3).

Figure 8-3: **Development of course offer in Political Education at DGB BW, Verdi and IGM 1994-2015**



Source: DGB BW Political Education programmes 1994-2015; Verdi Social-political education seminars 2002-2015; IGM Social-political and Political education seminars 1994-2015; own illustration. DGB BW programmes of 1996 and before 1994 were unavailable. IGM programmes 2009, 2005 and 1995 were unavailable.

The closures of the DGB BW educational centres in Hamburg-Sasel and Niederpöcking at the end of 2011 might also explain why the number of participants in political education has dropped (Kubik, 2015, interview). However, location is just one deciding factor that leads to course participation (ibid). In fact, figure 8-3 shows that the trend in decline at the BW started well before, in 2007 at the latest. The closures appear to have only accelerated the trend.

Another minor reason for participants staying away from political education may be the anger which rejected applicants can spread to other prospective participants. The IT system monitors this so that previously rejected candidates are not dismissed a second time, but human mistakes may happen (ibid).

A more prominent reason to avoid political education seminars might be the inconveniences which can result from claiming educational leave. Particularly in times of work intensification, and where educational leave is not integrated in corporate personnel planning, course attendance can be justified easiest in front of both team leaders and colleagues through reference to economic utility (Michelbrink, 2015, interview).

The fear of job loss as well as peer pressure act as forms of indirect control which courses members choose (ibid). This pressure appears also to influence members' perception of how useful political education is: they would see in such seminars the least utility. Members would not have a Humboldtian understanding of education. They would be in search of themselves as a function, not as human beings (ibid).

Likewise, the utility of European/international seminars seems unclear to members. From the local perspective in the company, Europe and beyond would be perceived as furthest away and, hence, most abstract. On the one hand, the distance could render cross-border actions

more difficult. On the other, knowledge about the EU Commission may lead to a feeling of powerlessness at the end of the seminar. How can it be ensured that participants left seminars equipped with Handlungsfähigkeit (Michelbrink, 2015, interview)?

Since the 1990s, those who do participate in DGB BW Political Education have been highly interested people. 'Lazy leavers' do not exist anymore (Kubik, 2015, interview). In 2014, more than two thirds of DGB BW Political Education participants were 51 and older. This number had increased slightly since 2011 (Kubik, 2015). If possible, gender is balanced 50/50.

Gehrke (2015, interview) wished that Political Education participants were younger. Therefore, first time applicants always get accepted, as well as young people. Young people activate older participants and, hence, improve the overall dynamic and participation in the seminar (Kubik, 2015, interview).

Likewise, international audiences are always highly enriching, yet they have needed to speak German. Different languages in the group as well as translator prohibit, to some extent, spontaneous interaction. A seminar in English would require different methods. Another problem is the lack of external funding (ibid).

Verdi b+b counts approximately 30,000 participants per year,¹³² whilst 3,000 attend GPB activities (Michelbrink, 2015, interview). Thus, Verdi facilitates learning for roughly 1.6% of its membership. The demand for political education is double the supply, especially in history and National Socialism, with trade union related topics less asked for.¹³³ A transnational aspect through a trip to Auschwitz or other relevant sites would be an asset to courses, yet both personnel and money are too short. Verdi is highly unlikely to finance an increase in seminar spending, however, because the union does not consider this relevant for organisational progress (ibid). This functionalist view of trade union education in praxis actually contradicts Verdi's (2007) proclaimed feature of educational work in theory to facilitate development as a person.

Usually, 5 people apply for a place in political education seminars, but only 2-3 for European/International courses. The latter seminars are visited by mostly older applicants who would not be as useful as younger trade unionists for progressing cross-border collaboration (Michelbrink, 2015, interview). Most of participants are "Bildungsbürger", and it has always been difficult for Verdi to attract the less educated (ibid).

Like at DGB BW, age, gender and professional background are the main selection criteria. Women and younger applicants are preferred in order to balance out the dominance of men (60%) and people above 50 (50%) (Michelbrink, 2015, interview). The age of participants

¹³² Michelbrink (2014), Politische Bildung von Arbeitnehmerorganisationen, pp. 13, unpublished.

¹³³ History would especially be demanded by people 40 plus in their search for more information on values and where they as a person come from. There are 3 seminars on National Socialism, whereas demand is as high as to fill 10 (Michelbrink, 2015, interview).

reflects, roughly, Verdi's membership: 71% of course participants are between the ages of 40 and 60, 12% between 30 and 40, and 7% up to 30.¹³⁴ In other words, Verdi as an organisation is quite 'old'. About 30% of participants are employed in public services, and they have least difficulties enforcing their right to paid educational leave (Michelbrink, 2015, interview; unpublished article). Participants from post and IT amount to 17%, whilst special services, including security guards and many precarious workers, are represented by 7%.¹³⁵

In general, GPB welcomes every application because "every education is meaningful – if it is for the right reasons" (ibid, author's translation). Merely good food and socialising are not appropriate reasons (ibid). All seminars offer childcare, but this offer is not well received because participants may prefer to use educational leave to take a break for family duties and may want to socialise in the evening instead of taking care of their child(ren).

Like DGB BW and Verdi, IGM's educational activities target, mainly, the lay representatives in the firms, i.e. approximately 70,000 works council members, 3,000 youth and apprentice representatives and 70,000 Vertrauensleute. Between 73,500 and 93,500 participants attend educational activities every year; thereof, 13,500 do so in the educational centres and around 60,000 to 80,000 do so locally (IGM, 2014). Given a total membership of 2,269,281, a small group of them (between 3.2% and 4.1%) is active in trade union education.

8.3.4.2.2. *Visibility*

The DGB BW's political education seminars are made public online on their own website as well as the online portals of the Federal Agency for Political Education (bpb) and the Land North Rhine-Westphalia regarding educational leave. The BW may publish course announcements in the DGB affiliates' newspapers and distribute printed copies and flyers. Flyers are printed three times per year. In addition, previous political education participants are contacted through a mailing list. The educational programme and flyers are also sent electronically to works council members in the hope that they will inform their respective co-workers. For at least 2 years, DGB staff have been informed about Political Education activities through a separate mailing list (Gehrke, 2015, interview; Kubik, 2015, interview). However, as noted earlier, they rarely show up as educational leavers. DGB BW, Verdi and IGM distribute their programmes, moreover, in printed paper form.

In short, German trade unions utilise various channels of communication and several forms of distribution in order to make their educational activities visible to potential participants.

¹³⁴ Michelbrink (2014), *Politische Bildung von Arbeitnehmerorganisationen*, pp. 13, unpublished.

¹³⁵ ibid

8.3.4.3. Competitors

For the DGB BW, competitors are basically all organisations that provide educational activities for political and trade union education, which are other trade unions and private consultancies besides churches and political foundations. The BW would certainly be happy if it could acquire market share from churches and political foundations regarding political education. They would not try to poach participants from other trade unions (Kubik, 2015, interview). Nonetheless, DGB affiliates are seen as competitors. IGM, for example, would not advertise the BW's political education programme (ibid; Gehrke, 2015, interview). Not many consultants are in the field of political education. The majority of them target works councils and other labour representatives for youth, the disabled, gender equality, etc. (Gehrke, 2015, interview). This is a further indicator that political education is a difficult business where money does not flow easily.

People's high schools (Volkshochschulen) are not competitors because they target a different group of people, namely rather low educated citizens (Kubik, 2015, interview).

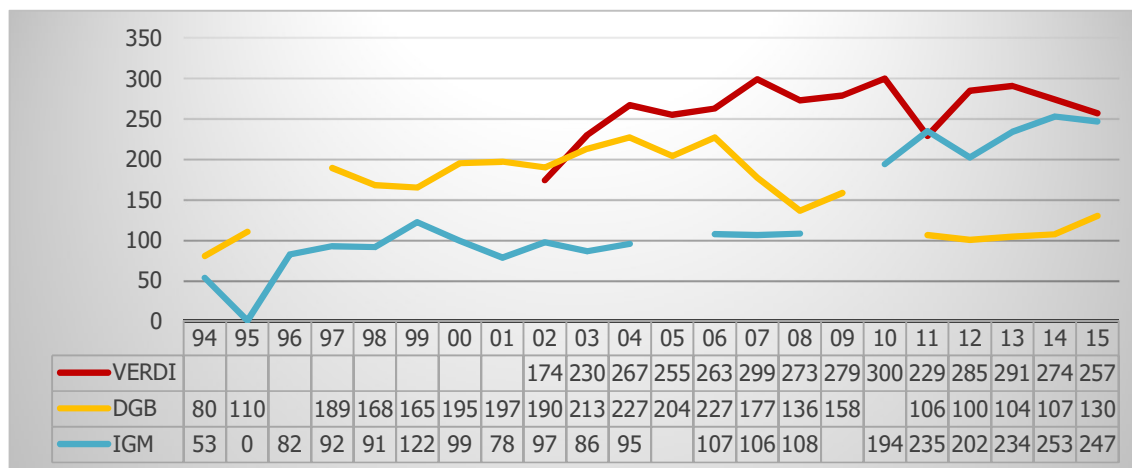
Verdi GPB, to the contrary, does not perceive any competitors. Rather, the executive director fosters constructive collaboration with other educational providers (Michelbrink, 2015, interview).

Whilst political education is a matter that can cause inter-union rivalry, works council training may unite unions against external 'villains' (i.e., private consultancies). The biggest private competitor for DGB BW is the Germany-wide Institute for Works Council Further Education (ifb). Like other consultancies, they would offer "great contents, super experts and much more attractive locations" (Kubik, 2015, interview). The BW tries to be pro-active, for example, through 'Bildungswerk on tour', where activities are held in hotels and other attractive trade union educational centres (ibid).

Both BW and Verdi agree that it is dangerous if works councils withdraw from the labour movement and seek education and consultation outside: works councils are in danger of being trained to become employers' accomplices since consultancies do not always take a labour-friendly perspective (ibid). Arguably, however, labour representatives are only in danger of becoming capital's accomplices if they have neither critical consciousness nor a holistic perspective. In fact, participation in management-oriented seminars may contribute to building a critical view. In order to represent labour's interests best, employees' representatives must be able to put on a manager's hat to 'know their alleged enemy' (as argued in chapter 7). Due to the growing competition from private consultancies, the number of seminars for works councils and other co-determining representatives has been decreasing (Gehrke, 2015, interview). This seems true for DGB BW and Verdi. Where between 1994 and 2006, the number of BW courses climbed from 80 to 227, it fell to a low of 100 in 2012. In 2015, 130 seminars were in place. Also, Verdi has increased the number of co-determination courses since its

foundation by roughly 50%. Since its peak of 300 in 2010, however, the amount has declined to 257 in 2015. IGM, to the contrary, has seen a steady rise in the number of its seminars from 53 in 1994 to almost 250 this year. Particularly since 2009, the amount of courses has risen sharply (Figure 8-4).

Figure 8-4: **Course offer for lay representatives and activists at DGB BW, Verdi and IGM**



Source: DGB BW Educational Programmes 1994-2015, without 1996, without Youth Education 1994-2004, without Works Councils 2010; Verdi Educational Programmes 2002-15; IGM Educational Programmes 1994-2015, without 1995, 2005, 2009; own illustration

Due to increased competition from both outside and inside the labour movement, DGB BW has more and more withdrawn from the field of company-level training to follow the earlier mentioned agreement with DGB affiliates.

In sum, (transnational) trade union education in Germany is challenged by the rather functional understanding of trade union education. The critical-emancipatory pedagogical approach seems most appropriate. In terms of resources, IGM appears financially in better shape than Verdi and DGB BW and has, hence, more human and material resources available. These three factors are the result of individual and collective human decision-making, such as union leaders and participants. Competitors' activities may have an effect on the number of actual participants.

8.4. European Works Council Training at DGB BW, Verdi and IG Metall

Of the three German trade unions under investigation, only two offer EWC training. The DGB has agreed with their affiliates to leave the field to them. It is the responsibility of the sectoral unions to take care of the company level, on the one hand, and their perceived sovereign territory, on the other. Moreover, most workers in Germany work in SMEs and not MNCs (Meyer, 2015, interview). Thus, even if DGB BW was allowed to enter into the field of EWC training, it is questionable whether they would do it since the quantity of workers in MNCs is perceived as too little for investing in education that supports their representation. Otherwise put, due to the comparably small number of workers in German MNCs, education for them is assumed not to have a significant impact on bringing the German and European labour movement any further.

Since DGB BW is not an active player in the field, the following investigations compare the activities of Verdi and IGM.

8.4.1. Course Programme

Like the ETUI, both Verdi and IGM offer in-house training on demand of the supranational representative bodies and EWC seminars as part of the annual education programme.

EWCs were addressed by Verdi b+b first in 2003 through a 5-day English course, which was repeated in 2006. In 2004, 2005 and 2011, a 5-day introductory course called 'European works councils - how does it work?' could be booked. Between 2007 and 2009, the area appeared to experience a high, when between 6 and 8 annual seminars regarding European and World works councils were on offer. Since 2012, however, EWC-related seminars have been missing completely (Verdi educational programmes 2002-15). Cross-industry seminars are difficult for certain reasons, which will be outlined below. Siebens notes, furthermore, that the sectors increasingly approach b+b directly. SERBs are delegated to the ETUI (Siebens, 2015, interview).

IGM, in contrast, has kept EWC-related activities in the programme ever since their introduction. The area started with one basic EWC seminar in 1995 (5 activities over 3 days) and increased to 7 different seminars since 2013. Besides the 3-day introductory seminar on EWC foundation, the seminars include optimising EWCs' practice (4x3 days), intercultural competence for (E)WCs and youth representatives (2x3 days) as well as 4 English courses: intensive and refresher for (E)WCs (6 and 5 days respectively); Business English for WC/EWC/General WC/Group WC (3x5 days) and English for WC work in international bodies (3 days). In brief, IGM offers 7 EWC and transnational work-related seminars that amount to 58 seminar days in 2015 (IGM educational programmes 1995-2015).

The striking difference in EWC training between Verdi and IGM also mirrors the fact that there are more multinational companies in the manufacturing industry than in the public service sector.

The most important function of EWC educational activities is the opportunity they provide for EWC members from different companies to exchange information (Röblier, 2015, interview; also the Beckers case in chapter 7). EWC members do not always take these opportunities, though. In 2014, for example, none of the two offered introductory seminars and only one of four workshops took place. National works council elections that year, as well as the fact that EWC members are usually multifunctional people who have many other commitments, may explain their absence (Röblier, 2015, interview). In other words, EWC members may have other priorities than transnational work.

In terms of in-house training, both Verdi and IGM are not very active. Verdi does not produce any statistics on EWC training activities, but between 5 and 6 per year are likely. Usually, they last for 2 days. A week, where an educational activity is followed by EWC agreement negotiations, is very seldom. Among Verdi's service users are Thomas Cook, Springer, Telefonica, Hapag Lloyd, Alliance Healthcare, Kühne & Nagel and Helvetia (Siebens, 2015, interview).

The EWC/SE team at IGM considers that they can do EWC training themselves, but they usually refer them to the ETUI. The competition is high, especially from private consultancies. Instead, the EWC/SE team presents and delivers workshops at EWC meetings as well as consults their German EWC members on improving EWC practice. Consulting is not paid, however. The major reason for this, as well as delegating EWC trainings mostly to the ETUI, is a legal problem – namely, the so-called 'prohibition to finance opponents' (Verbot der Gegnerfinanzierung).¹³⁶ IGM is currently deliberating on how to solve this problem (Röblier, 2015, interview).¹³⁷

The Verdi GPB executive director finds the disinvestment in EWCs disenchanting. Comparing the costs and benefits of EWCs and WCs, the former always lose out. Coordinating EWCs is more expensive, meanwhile, and would not benefit membership recruitment. Against

¹³⁶ In fact, it is not a prohibition, but an expectation. In their jurisdiction 28.06.1995 - 7 ABR 55/94, which concerns works council training by DGB BW Hamburg, the German Federal Labour Court expects employers not to finance their opponents. For the Court, financing means that the opponent generates profit. Employers are therefore allowed to check whether trade unions generate profit from works council training by demanding a cost breakdown. Furthermore, employers are obliged by § 40, 1 German Works Constitution Act to pay necessary works council trainings. In order to avoid discussions on what is necessary whilst make obvious that they do not generate profit from works council training, trade unions may outsource their educational activities and found independent educational centres. Thus, DGB created the Bildungswerk as a registered association (e.V.), whereas Verdi b+b is a non-profit company (Gemeinnützige GmbH). Trade unions may also cooperate with labour-affiliated and labour-friendly educational institutions.

¹³⁷ Is it useful to bill EWC trainings and consultings through the ETUI or the Hans-Böckler-Foundation (HBS)? Might the ETUI and the HBS then claim a say in the educational activities? If IGM founded an independent training organisation, would it become too autonomous? What about the huge additional administrative burden, since the IGM is a big organisation?

the background of scarce resources, the local firm level will always be closer and, hence, more important than the European level. Moreover, due to the small number of MNCs in services, educational activities at Allianz or Ikea have a relatively small impact on the national level. As a result, due to the constraint in resources, Verdi has decided, purely rationally, to invest into education where the impact is maximal and the expenses are minimal (Michelbrink, 2015, interview).

8.4.2. Selection of Participants

IGM organises, predominantly, metal workers, but also employees in wood and textile manufacturing, for instance. Hence, their educational activities are within sector, unless they collaborate with their ETUF industriAll and invite colleagues from the chemical, mining and energy sectors.

To the contrary, Verdi includes 13 industries. EWC seminars can, therefore, be both within and across sectors. The former are better accepted than the latter (Siebens, 2015, interview). Put differently, it is easier for Verdi to fill single-sector seminars than mixed-sector activities. The demand for mixed-sector activities is little for two reasons: on the one hand, because of the complex matrix structure of Verdi and its numerous industries, the key focus of both national and transnational activity is in each sector separately. As a result, cross-sector seminars are rarely asked for. On the other hand, potential participants perceive cross-industry seminars as more abstract whereas within-industry seminars appear closer to their daily work. The perceived distance to their daily work apparently discourages potential participants from taking part in cross-industry EWC seminars. Those who have participated in mixed-sector activities, however, evaluate their learning experience as very fruitful (ibid).

It follows that the majority of EWC members in the service industry can neither imagine what common 'Erkenntnisinteresse' (interest in insights) they have with colleagues from different sectors, nor what they could learn from them. The differences between sectors are seemingly much more obvious than the similarities. Moreover, the majority of EWC members in the service industry seem rather short-sighted in their educational goals, as they fear to leave their sectoral comfort zones. This may also explain why European topics and, hence, EWC training activities, too, are generally "difficult business" (Hauck, 2015, interview).

EWC seminars are visited, rather, by younger members. The more mature members see less need for education. They consider education as more important in the early stages of membership and believe that they know everything necessary by now (Rößler, 2015, interview).

8.4.3. Visibility

Both Verdi and IGM notify potential participants about educational activities through several channels. IGM sends emails directly to their roughly 450 EWC members as well as to EWC coordinators and company coordinators (Unternehmensbetreuer) (Rößler, 2015, interview).

Verdi has a mailing list of all national works council members. Another mailing list is a remnant from a previous EWC newsletter which was created by the now competing institution that offers EWC training and is led by Werner Altmeyer (see chapter 6). The newsletter was active between 2006 and 2010. Likewise, EWC-relevant colleagues in the sectors are contacted and b+b's channels used. Emails to Landesbezirke (regional) and Bezirke (local) are sent with the request to forward them to staff. Staff are not always informed about the regional and local activities, however, because of difficulties in addressing the right colleague, or any at all (Siebens, 2015, interview).

In comparison, IGM has adopted a more direct and targeted approach to making their EWC educational activities visible.

8.4.4. Human Resources

MNCs like TUI and Volkswagen, where co-determination culture is strong, usually employ a full-time in-house consultant who shall work in the interest of the representative body. Trade unions may employ a full-time or part-time secretary. In other cases, neither companies nor trade unions have someone hired for EWC matters, but they may seek external advice, if needed. Thus, there is a hierarchy from the EWC coordinator, to the EWC expert, to EWC advisor. This hierarchy mirrors the intensity of taking care of EWC concerns (Siebens, 2015, interview). In this hierarchy, both Verdi and IGM are on level two.

Verdi employs one expert at the national level (Siebens) as well as a few colleagues in the respective sectors. Siebens' job description provides for EWC-related tasks only part-time. His major occupation is with supporting the works council elections every 4 years between March and May, for which he requires 2 years, all in all. For his sectoral colleagues, EWC-related tasks are, likewise, additional only. As a consequence, EWC concerns are frequently left unattended because the secretaries' work capacity is usually filled up by national duties. Therefore, Siebens (2015, interview) wonders whether anybody would miss his EWC-related work at all if he stopped doing it. One focus of Verdi is always member recruitment – and "EWCs do not make any members" (ibid; Michelbrink, 2015, interview).

The EWC/SE team at IGM consists of two experts (Ralf Götz, Holger Rößler). Rößler was hired in January of 2015. Götz appreciates his new colleague, for he has now someone to talk to and does not feel like a "Einzelkämpfer" (lone fighter) anymore (Rößler, 2015, interview). The two experts are supported by two administrators, including a young lawyer who has

specialised in SEs acts in an advisory capacity and whom Rößler praises for his love of negotiating instead of dictating and his understanding of intercultural issues (ibid).

The decision to double the work capacity of EWCs/SEs suggests that IGM considers it important to have a stronger and more professional voice in European MNCs. The investment in human resources notwithstanding, IGM leadership considers EWCs not the most important representation unit in a company, though, because it has less decision-making authority than a group works council or colleagues on the supervisory board (ibid).

Due to constraints in human and time resources, neither Verdi nor IGM have an EWC learning pathway like the ETUI's. The number of EWC-related activities in Verdi is too low to render investment into more structure viable. IGM, however, has moved a step closer towards a more structured pathway just recently, with 2016 the first year where 2 to 3 EWC workshops will build on each other. These workshops will concern new EWC members, economic figures and pro-active EWC work. Moreover, IGM will host, on the 19th and 20th of October 2015 in Frankfurt an EWC/SE forum for the first time. The idea to connect academia, EWC coordinators, industriAll and European/SE works council members has been around for a while, but the human resources to organise the 2-day networking event had been insufficient. The forum is connected to a subsequent 3-day seminar on optimising EWC work (Rößler, 2015, interview).

8.4.5. Competitors

Actors on the EWC training market are private consultancies as well as other trade unions (see also chapter 6). Not all virtual competitors are perceived as such, though.

Like for the ETUI, a competitor for both Verdi and IGM, who is rather a cooperative partner in selected seminars, is the German consultant Hellmut Gohde. By contrast, the EWC Academy in Hamburg led by Werner Altmeyer has turned from a previous cooperator into a competitor. Both Verdi and IGM have terminated collaboration with Altmeyer due to his increased departure from labour-oriented seminars. He is perceived more as a business man now, who – according to IGM – has not always respected agreed upon terms (Siebens, 2015, interview; Rößler, 2015, interview).

Likewise a competitor for the ETUI, the Presence Group has approached IGM for collaboration in EWC training, with a great Social Media module and translation package on offer (Rößler, 2015, interview). To boost their service, Presence became shareholder and partner of the Paris-based online information platform 'Planet Labour' in 2012. However, their integrity can be questioned. It is known that Presence secretly recorded an EWC training in order to share it with the employer (ibid).

Other competitors to IGM are the French Consulting Europa, a joint venture of SECAFI Alpha Group – which also the ETUI perceives to be in competition with – as well as the

Germany-wide Institute for Works Council Further Education (ifb) (ibid). As mentioned in chapter 6, SECAFI works closely with the formerly communist French confederation CGT. Incidentally, SECAFI played a role in the ABB Alstom and Alcan-Pechiney-Algroup cases (see Erne, 2008). The ifb tries to lure potential customers with 'free starter goody bags'¹³⁸ valued between €170-250 which are included in the seminar fees and, therefore, paid by the employer. Union members and non-union labour representatives, once lost to private consultancies, would be difficult to get back (ibid).¹³⁹

Whilst consultancies related to other trade unions may be perceived as competitors, the trade unions are not perceived as such, neither by Verdi nor IGM. It was considered more important that EWC members receive good training (ibid). From time to time, even cooperative initiatives are created, notwithstanding their different political stances on certain issues.¹⁴⁰ Regarding EWC training, IGM recently invited Verdi and the Mining, Chemical and Energy Industries' Union (IG BCE) to send their members to IGM courses. This might be difficult for Verdi, however. Since IGM organises along supply chains, the Metal Workers' Union would enter into companies organised by Verdi (Siebens, 2015, interview). Through this back door, Verdi might lose members to IGM.

8.4.6. Individual Commitment to EWC Training

In Verdi, EWC-related activities have, so far, been supposed to support new representative bodies to get going: "training is very, very important from the beginning" (Siebens, 2015, interview). An important aspect of this is identity building and establishing a working culture where all members act in concert (see also the Beckers case in chapter 7). Once the foundational process is completed, EWCs are usually left on their own (Siebens, 2015, interview).

As a result, EWCs would, most often, develop neither proper communication and working structures nor a strategic focus. Instead, the bodies stay caught in country-specific differences and fail to move beyond internal barriers. According to Siebens, any following EWC trainings, therefore, often remain nothing more than 'action therapy' ("Beschäftigungstherapie", i.e. meaningless action for the sake of doing something) and a distraction from the much more important fundamentals (ibid). Another problem is that membership in the body may change

¹³⁸ Starter packs include a selection of Tablet-PC, legal text books and companions, self-help books, USB stick and business backpack.

¹³⁹ The references which private consultancies market their services with can conceal their rather business-friendly perspective. Searching in Google, ETUI and consultancies are among the first hits, but not trade unions as such (Rößler, 2015, interview).

¹⁴⁰ Currently, the Federal government's proposal to pass a law that stipulates only one collective agreement per company (Tarifeinheitgesetz) is debated. It means that the collective agreement of the trade union, which has the most members in one company, applies to all workers in that firm. In effect, the voice of minority interest groups is silenced. These trade unions are consequently in danger to lose members, since they are forbidden to represent interests in a particular firm. Whilst Verdi opposes the government's proposal, IGM – as the biggest trade union in Germany – favours it.

over time. This can affect the group's balance and structures. Therefore, most EWC would still be powerless, as they have not learned to act in concert (ibid).

Ideally, therefore, every EWC has an individual mentor for the lifetime of the representative body who can consult on little details in the day-to-day business as much as on the bigger picture. The mentor would be able to break up the national structures in which EWC members remain stuck. Thus, the mentor would not only help to solve internal conflicts, but would also to use the diversity constructively to create a unique transnational identity (ibid).

Rößler (2015, interview), likewise, points to the fact that people come to EWC trainings with different prerequisites regarding their understanding of and experiences in education. Getting these different people to act in concert is a process that requires accompaniment. For IGM, this should be the task of their 19 EWC coordinators who coordinate 98 of 320 EWCs that fall within IGM's reach. A commitment to coordinating and consulting EWCs, however, depends on the respective person: some are committed whilst others are not really.

Neither Verdi leadership nor the sectors seem to be interested in expanding EWC training by individual mentoring, though, because they do not see any added value of EWC educational activities. As mentioned before, union management argues that EWCs do not yield any new members. At the same time, EWC members are incapable of identifying their training needs and do not ask for respective activities. Even the demand for the basic EWC seminar decreased as much as to be withdrawn from the Verdi b+b programme, like any other EWC-related seminar.

Similarly, in IGM, EWC training is an 'exotic topic' ("Exotenthema") given that, from a total of 2.2 million union members, only about 450 (0.02%) are members of a EWC (Rößler, 2015, interview). In addition, the image of EWC members in general is rather unfavourable: they "just travel and get nothing done" (ibid). Moctonian (2015, interview) reports the same image for Unite in Britain. Given that high-impact EWCs have remained an exception, this image is, arguably, not without reason, and needs to change in tandem with a rise of effective EWCs (Rößler, 2015, interview).

In order to make EWCs more effective, Thomas Kehrbaum, Head of International Education at IGM, has initiated three projects since 2009, funded by the European Commission. In collaboration with labour from Europe (ETUI), Britain (UNITE) and Poland (FZZ, Solidarność), global corporations (Panasonic, Dräger, Flowserve, NCR Corporation, Rolls Royce, Visteon) and academia (Technical University Darmstadt), the goal of 'Trans-Quali-EWC' was to advance the quality of EWC training beyond dealing with the EWC directive. The project suggests, among others things, political, technical, methodological, social and action-related skills that would form a unity of transnational skills required for working in cross-border contexts.

Remarkably, Kehrbaum (2010) does not understand his version of Transnational Competence as a 'functionalist toolbox', but as a 'holistic action-oriented frame'. Through this

frame, labour representatives may be activated from sensitivity to cross-border issues in multinational seminars to managing international solidarity campaigns as World Works Councils.

Subsequent to proposing a common educational strategy for EWC training, the follow-up project, 'Net2Quali-EWC' (2011-12), was progressed and tested through labour education institutions from other countries: Czech Republic (OS Kovo), Denmark (Co-industri), Finland (Metallilito), Spain (Institute for Education and Social Science (IFES)), Sweden (IF Metall). Together with Germany (Berufsbildungswerk, bfw), the European level (ETUI) and national academia (Ruhr University of Bochum). IGM expanded the transnational education network and developed 18 quality standards for EWC training. Like Bridgford and Stirling (2007), the project participants called for cross-border collaboration in trade union education, in particular the 'Europeanisation of EWC training' (Dreßen, Kaczmarek, Kehrbaum, & Roggenkamp, 2012).

Another result of the project supports the argument of chapter 2 that labour representatives must be understood as individual persons if transnational labour collaboration is to become stronger. Pries (2012: 56) finds that we must "take the personal experience of EWC members more into account and turn such into a subject in learning processes". This applies to both the qualities and deficits each individual brings to the representative role as well as to educational activities.

The third project, 'Quali2move' (2011-12), included – besides IG Metall, bfw and the ETUI – trade unions from Austria (ÖGB), Lithuania (Litmetal), Poland (ZNP - Związek Nauczycielstwa Polskiego), Romania (Cartel Alfa), Sweden (IF Metal) and Turkey (Birlesik Metal). Scholars from Kassel University and Bundeswehr University contributed to the project as well as Irish colleagues from the Institute for the Development of Employees Advancement Services (IDEAS, see chapter 9) and Spanish colleagues from the Instituto De Formación y Estudios Sociales (IFES). The participants propose a common understanding of trade union political education that is based on and promotes the key principles of democracy, solidarity, critical pedagogy and European identity. They declared an intent to implement these principles into their national labour educational work as far as resources, culture, history and the socio-political context allow (Kaczmarek et al., 2012).¹⁴¹ The impact of the project in the respective countries has yet to be evaluated.

Nonetheless, Kehrbaum (2015, interview, author's translation) seems right when he highlights the "strong innovative and visionary power" of these three projects, because they have pushed for a transnational alliance in trade union education long before trade unions themselves have seen the need for it. "If someone can change the trade unions, it is the

¹⁴¹ As a matter of different trade union cultures, Kehrbaum (2015, interview) describes trade unions in Spain, in particular Comisiones Obreras (CCOO), as rather conservative in terms of changes. In Germany, the picture would be mixed. Some are more eager to keep the status quo whilst others strive for innovation. Verdi would have a "strongly militant rhetoric". Whether their actions are equally militant would need further investigation.

educators" (ibid). Workers would not reflect on European identity; this topic is "far away from their experiences at work and in everyday life" (ibid). This means, conversely, that trade union education at IGM has, so far, failed in bringing closer the European dimension to their members.

In sum, IGM has increased its EWC training activity since its introduction in 1995, whilst Verdi has diminished it since its first educational programme in 2002. IGM has enlarged its EWC-related seminars in the yearly programme, consistent with the rise in the number of EWCs in the manufacturing industry. Verdi's decision to reduce the same is, however, striking as the number of EWCs in private and public services cannot be expected to have fallen likewise. On the one hand, the demand of Verdi members may have decreased to such an extent that on-demand activities are more reasonable than pre-scheduled ones. Similarly, IGM members do not always take up IGM's EWC-related course offers, as some seminars had to be cancelled in the past. At the same time, Verdi leadership appears to consider EWC courses a luxury that are not affordable against the background of limited resources. Besides that, coordinating EWCs is more costly than coordinating national works councils; neither would EWCs contribute to membership recruitment nor would they make a big difference for union capacity at a national level.

Conclusion

This chapter examined how German trade unions make their lay representatives and members fit for transnational teamwork, especially through developing transnational competencies and distributing knowledge, attitudes and skills.

The chapter began by outlining the form of adult education prominent in Germany, which is Political Education. As we have seen from the trade unions' educational programmes, political education is a fundament of trade union education. Historically, it has meant to 're-educate' German civilisation after the indoctrinations of the Nazi regime, and the purpose of political education is still to enable citizens to become 'mündige Bürger' – i.e., autonomous in their ability to think, evaluate and act. This maturity is a precondition to participating in democracy. The more critical-emancipatory political education is, the more that people are facilitated to question, resist and transform the institutionalised injustices built in to allegedly democratic systems that govern human society.

It was found that German trade unions offer an impressive amount of educational activities and dedicate a certain space of their activities to European and global issues. In 2015, this space is similarly small at Verdi (ca 12%) and IGM (ca 8%). Strikingly, although IGM has created its own department for international labour education, its share of transnational content in the programme is smaller compared to Verdi's. DGB BW provides approximately twice as much transnational educational space as its sectoral affiliates. This is probably due to

the fact that the DGB has agreed with its affiliates to stay away from the company level beyond their traditional programmes for labour representatives.

Remarkably, despite the limited size of cross-border educational space, German trade unions relate to all six transnational competencies, albeit to different extents and kinds. All three trade unions seem prepared to facilitate analytic competence. Communicative and functional competence is also important for German trade unions, but for Verdi more than DGB BW and IGM in view of the national and German-speaking context. IGM appears most developed regarding functional and communicative competence with particular emphasis on the English language. However, all three trade unions seem to miss out on several items which the TC framework defines as communicative and functional competence. Similar gaps are true for creativity and imagination. Although creative-imaginative competence sounds essential to German trade unions, their understanding of it appears short in reach and weak in innovative power. Verdi seems a leader in building transformative competence, as the union's courses address more transformative features than DGB BW's and IGM's do and match the TC framework fairly well. IGM's programme seems least helpful not only in transformative terms but also regarding emotional competence. This is striking, as the education of emotions is a declared aim, even if second to knowledge and skills. However, DGB BW and Verdi seem furthest away from the definition of transnational emotional competence.

Due to the comparably small area of transnational trade union education in Germany and the largely incomplete development of transnational competencies, the impact of trade union education on improving cross-border labour collaboration is insignificant. Also, the target group for transnational competence building as well as the unions' understanding of trade union education appears to hamper more comprehensive utilisation of the TC framework.

Regarding the target group, DGB BW and Verdi have included transnational topics in its political education for the general membership whereas seminars for employees' representatives and activists hardly ever touch upon transborder issues. IGM distributes transnational topics in both political education and activities for works council members and other representatives and activists equally. Verdi had a high level of EWC-related courses between 2007 and 2009 and has dropped them from the programme since 2012. By contrast, IGM has expanded its course offerings for EWC members to a considerable range since 1995. However, sectoral unions are not very active in training whole EWC bodies.

As a result, the impact of transnational competence on cross-border collective action is arguably higher in IGM than Verdi and DGB BW because works council members and union activists have much more collective power compared to the individual participants in political education seminars.

However, even if transnational competence development at IGM appears more powerful due to the target group, it is questionable whether the rather small amount of educational

space is enough to build a critical mass that multiplies and effects transformative change. If, in 2015, all 25 educational activities with transnational contents were fully booked with an assumed number of 15 course participants – some activities take place up to 7 times per year – transnational trade union education at IGM would reach around 700 people. Of these 700, about 180 would be members of EWCs and national works councils who are exposed to an international environment (25.7%).

Concerning the understanding of trade union education, the major purpose of courses and seminars for DGB BW and IGM is to equip trade union members with knowledge, skills and competence to improve their day-to-day work locally in the company. The amount of political educational activities which critically question existing economic, political and social structures and may help emancipate from the inequalities and discriminations that the structures have brought about are significantly higher in Verdi. Yet, Verdi also concentrates on developing knowledge and skills. Like DGB BW, Verdi seems to consider it the members' responsibility to develop appropriate attitudes for emancipation. IGM appears to give attitudes a dedicated space in education, but it seems not to put the heart on an equal level with the head and hand. As we know from mobilisation theory, however, people are not driven to take action because they know about an issue, but because they perceive it as unjust (see chapter 2).

As noted in chapter 2, the reasons for the small attention paid to transnational competence building is a matter of structures, organisations and people as well as the result of individual and collective decision-making. Both national and sectoral structures seem at play. The predominantly functional understanding of trade union education, as just described, is a common national structure of trade union education which DGB BW, Verdi and IGM have co-created; it is not a result of sectoral conditions. Differences in sectoral conditions may explain differences in the target group of transnational courses (e.g., why Verdi has integrated European and international issues almost exclusively in political education for educational leavers, whereas IGM rather addresses labour representatives).

However, sectoral differences cannot explain the small educational space for transnational competence development which IGM and Verdi have in common. Rather, the low attendance for transnational trade union education is a consequence of organisational and personal decisions. Arguably, the small educational space for transnational topics in both sectors reflects the low priority which both labour representatives and union leadership in the manufacturing and the public and private services sector attach to cross-border collaboration.

Union Representatives obviously demand knowledge and skills in order to counteract businesses' self-interested, worker-hostile behaviour. Since works council members and other representatives take on these roles voluntarily in addition to their actual jobs, capacities to think beyond national borders are probably perceived unimportant.

Union leaders, especially Verdi's, consider EWC coordination more expensive than coordinating works councils locally and nationally. Moreover, given the need for membership recruitment, EWC members would not likely contribute to organising. This argument appears unreasonable, though, because every unionised EWC member is usually also a labour representative in the local firm, and so can still talk to colleagues and try to convince them to become a union member. Furthermore, the time that most labour representatives spend on EWC activities per year is only a fraction of what is invested in local concerns. Therefore, the argument that EWC members deserve only little educational attention because they do not contribute significantly to organising activities cannot be supported.

Union leaders may argue, likewise, that successful EWC action would not have a notable impact on the national level. Arguably, strike actions at Amazon or Ikea Germany that are initiated by EWCs may have a substantial impact on the national level. The national level is, likewise, effected if EWCs keep jobs from being relocated to other countries or terminated. EWCs can also collaborate with the national and local works councils and, thus, reinforce their power. As a result, the cost-benefit calculation which some union leaders appear to advocate seems flawed.

In sum, German unions' transnational educational activities facilitate Transnational Competence only in part, and the majority aim at those people in the trade union who are less powerful and active than works council members, health and safety representatives and other activists and multipliers. Given the perception of a low priority for improving cross-border collaboration, the problem is, arguably, a matter of attitude as opposed to resources. If people consider something important, they create new space and resources or redistribute what they have. Because transnational collective action is undervalued and regarded as a luxury instead of part of trade unions' core business, educational activities with cross-border contents are not viewed as strategic tools for organisational development. If transnational trade union education were used strategically, it would target labour representatives much more purposefully.

However, it must be noted that, even if small and not (yet) targeted or distributed perfectly, German trade unions do have integrated transnational and global concerns in their educational programmes and facilitate transnational competencies to some extent. This means that cross-border labour collaboration is already within trade unionists 'collective action frames' (Snow, 2004) and has potential to move from the margin towards the centre. As we will see in the following chapter, by contrast, most Irish trade unionists do not seem to have given transnational labour collaboration a similar place within their 'collective action frames'.

Some signs indicate that the concern for transnational trade union education is slowly on the rise in Germany. Even if the share of the total programme points is not in the same direction, nominally, the amount of courses with cross-border content has been increasing in

both Verdi and IGM since 2011 and 2010, respectively. Since educational space as well as resource investment in transnational courses has grown, transnational collaboration must have been perceived more important. Likewise, IGM hired in of January 2015 a second EWC expert. This assumption is underpinned by the work of IGM's International department which introduced its own conceptualisation of Transnational Competence in 2010. Two EWC-related projects were completed between 2009 and 2012 involving trade unions from other European countries. Also completed in 2012 was a project on improving and harmonising the understanding of transnational trade union education in collaboration with European comrades.

Thus, even if IGM's transnational educational activities are smaller in number and share compared to Verdi's course programmes, supporting activities have been running in the background at IGM which seem not present at Verdi. These background activities may be related to the fact that the manufacturing sector includes more multinational companies and is, hence, more internationally oriented through exports than the public and private service industry. As a consequence, the amount of EWCs is considerably higher in manufacturing than in services. It must, however, be acknowledged that Verdi leads the way in transnational transformative competence development and has promising ideas for future educational areas, including inequality, Europe between exclusion and inclusion and fundamental social and human rights.

Nonetheless, IGM appears more likely than Verdi to innovate in the area of transnational trade union education. Firstly, the International department showed remarkable innovation through the conceptualisation of Transnational Competence and the three aforementioned European projects at a time where IGM leadership was not on the same page. Secondly, IGM appears not to be in financial difficulties like Verdi and DGB BW, as IGM just bought an additional educational centre from the latter whilst Verdi and DGB BW are reducing theirs. Thirdly, unlike Verdi and DGB BW, IGM mentions attitudes explicitly as an educational aim, even if it is second to knowledge and skills. Attitudes are key to transnational collective action (see mobilisation theory in chapter 2), to expanding the area of transnational trade union education and to developing transnational emotional and transformative competence (chapter 4). Finally, IGM is usually the benchmark for national collective bargaining. Perhaps the union is eager to transfer this leadership to the transnational level. As we will see in the final empirical chapter, the Irish trade union with an international department is most active in cross-border trade union education.

However, the DGB BW has the potential to innovate. Since the BW is not welcomed by its affiliates at a company level, its educational programme for works council members and other representatives is actually a triplicate, given that Verdi and IGM have their own programmes. Smaller DGB affiliates do not have their own educational departments and would not

necessarily want to 'amalgamate' with Verdi and IGM. Assuming that these affiliates appreciate the DGB's course offerings for the company level, it might yet be possible – with permission from the affiliates – to transform the BW's traditional labour representative programme towards a more international orientation so that duplication of education (and, thus, of resources) is reduced and value is added.

In addition, the DGB BW collaborates already with several partners in developing countries as part of the North-South-Net, and these contacts could be developed beyond DGB's support for development education and utilised in new ways. Not only might the North-South-Net become a platform from which transnational collective actions arise, but educational activities which are now part of political education could be tailored to courses for labour representatives. Mutual exchanges between labour representatives from Germany and the partner countries could be part of these courses and single activities. One educational objective of these exchanges could be to address the matter of 'labour imperialism' and how to overcome it.

As we will see in the following chapter, this idea can also be applied to Ireland since the Irish union confederation is also active in developmental education.

PART IV – TRANSNATIONAL TRADE UNION EDUCATION IN TWO DIFFERENT NATIONAL CONTEXTS

The overarching question behind this research project is, 'To what extent does trade union education in Ireland, Germany and at the EU level foster labour representatives' transnational competencies, and what are major challenges to achieving that?' Trade union education at the EU level and in Germany has been established in the previous three chapters. In this final empirical chapter, we look at how Irish trade unions prepare lay representatives' and members' transnational competencies, and what challenges they face in so doing. As a matter of scope limitation, the chapter touches upon education for trade union staff only marginally. The unions under investigation are the national confederation ICTU (Irish Congress of Trade Unions), SIPTU (Services Industrial Professional Technical Union), IMPACT (Irish Municipal Public and Civil Trade Union), Mandate (the Union of Retail, Bar and Administrative Workers), TEEU (Technical Engineering and Electrical Union), and UNITE the Union.

Founded in 1959, ICTU (2013b) has 48 affiliates, of which 20 organise in the Republic of Ireland (ROI) only, 14 in the ROI and Northern Ireland (NI) and 14 exclusively in NI. Its Congress represents 566,336 workers in the ROI and 211,800 in NI, with a cumulated female membership of 52%. SIPTU, IMPACT, Mandate, TEEU and UNITE are all ICTU affiliates and, together, account for 63.9% of ICTU membership in the ROI. Regarding education and training, Congress is "very much in transition". A national Workers' College has been under research and construction since 2011 (Vaughan, 2015, interview).

SIPTU is by far the biggest affiliate of Congress, with 199,881 members in the ROI plus 7,000 in NI in 2012. Thereof, 77,580 (39%) and 3,000 (43%) are female (ICTU, 2013b). The union formed in 1990 through an amalgamation of the Irish Transport and General Workers' Union (ITGWU) and Federated Workers' Union of Ireland (FWUI). Moving from previous organisation in five regions, membership has been regrouping into five sectoral divisions since 2010: Health, Manufacturing, Public Administration and Community, Services, and Utilities and Construction (SIPTU, 2013). This restructuring is considered an essential part of the union's turn towards organising. Understanding itself as an 'organising union', SIPTU's ambition is to 'Education, Agitate, Organise' (O'Flynn, 2007). This ambition is written on the doormat which lies inside the entrance of SIPTU College in Dublin.

SIPTU established, in 2001, an independent research and training organisation, IDEAS (Institute for the Development of Employees Advancement Services). Besides some course offerings for union members, the Institute engages in educational projects with other trade unions in Europe.

The second biggest ICTU affiliate is IMPACT. The union has 59,100 members in the ROI, with a majority of them women (73%) (IMPACT, 2015). Like SIPTU, IMPACT has organised along five sectoral divisions, which are Civil Service, Health and Welfare, Education, Local

Government and Municipal, and Services and Enterprises. The union's activities in both national and transnational trade union education is least of all. After the first programme for workplace representatives was introduced in 2011, more than 300 had been trained by 2014 – i.e., probably around 80 per year (IMPACT, 2015). For joint European and international projects, resources are missing.

A successor of the Dublin Drapers Association, Mandate has 40,286 members in the ROI, of which 30,000 are females (74%) (ICTU, 2013b). Members are mostly employed in rather low-paid and precarious positions in retail. Many of them have “very little opportunity for further education and some would be early school leavers”.¹⁴² The union prides itself on “modern and effective training” as its second of 10 proposed reasons to join the union.¹⁴³ In fact, Mandate opened, in 2009, a new Organising and Training Centre in Dublin that provides a range of courses which are quite varied and considered for the union's size. For example, although the union does not provide any EWC training, it uses one course as the first step towards forming an EWC. Moreover, specific modules can be connected to form a pathway (back) into the national formal education system, which eventually provides access to university. Also, a course developed by ICTU/SIPTU may open a door to third level studies. Unlike SIPTU and IMPACT, however, Mandate is still organised along regional divisions, which are four in Dublin and seven across the country.

The TEEU, meanwhile, is “the largest craft union in Ireland” (Yeates, 2015) and it organises, almost exclusively, men. Originating from Britain, the self-proclaimed Power Union has 39,000 members in the ROI, with only 142 of these women (0.5%) (ICTU, 2013b). Providing education and training since 1993, the organisation proposes to “take a leading and active role in the provision of technical skills and workplace representative's education and training within the trade union movement”¹⁴⁴. TEEU promotes access to its education and training opportunities seventh on a list of “10 good reasons to join the union”.¹⁴⁵ The course programme is fairly short and moves beyond borders only in the module on Equality and Diversity, part of the Trade Union Representation Skills course. TEEU staff may attend ETUI activities, though.

UNITE The Union is a transnational case as such. Headquartered in London, the union has offices in Belfast and Dublin for 59,521 members on the island of Ireland (ICTU, 2013b). From a total membership of 1,405,071 (2013), roughly 1.7% are in the ROI (23,851 in 2012) and about 2.5% in the NI (35,670 in 2012) (ICTU, 2013b; UNITE, 2014). The share of female membership in the ROI is 8,763 (37%) and 8,035 (23%) in the NI (ICTU, 2013b). The union

¹⁴² Morrissey in Mandate News 2010, Issue 4: 13.

¹⁴³ Mandate Trade Union, Shopfloor, May 2015: 19.

¹⁴⁴ Internal document: Technical, Engineering and Electrical Union – Education and Training, 2015. Provided by Sean Heading.

¹⁴⁵ Advertisement in fusion - Official Magazine of the TEEU, Issue 15, January 2015, p. 22.

evolved through a merger of Amicus and TGWU (Transport and General Workers Union) in 2007 and is currently considering amalgamation with the Public and Commercial Services Union (PCS). The island of Ireland is one of 11 regions around which UNITE is structured. For the 22 sectors which it represents,¹⁴⁶ the union follows a "strategic plan to create a first-class education service".¹⁴⁷ However, few Irish members appear to utilise this service. Similar to the German metal workers' union, UNITE has an international department.

The structure of this chapter is threefold. The first section looks into the kind of adult education which is prominent in Ireland. As opposed to Political Education in Germany, Ireland has a history of *Community Education*.

The second section analyses the educational activities which the above mentioned trade unions offer in terms of course programme and planning. Particular attention is paid to activities with transnational concern and their ability to develop participants' six transnational competencies. Moreover, corresponding to the analysis of the two ETUI learning pathways (chapter 7) and the German unions' (transnational) educational activities (chapter 8), the share of knowledge, attitudes and skills in Irish trade union education is investigated. Like the previous empirical chapters, this chapter attempts, thirdly, to uncover the challenges which may foster and hamper Irish trade unions to integrate the concept of Transnational Competence (TC) (chapter 4) into their educational activities. Applying the analytical framework of part II, the relevant factors which are revealed through a number of expert interviews and document analyses can be related to the *understanding of trade union education*, the *pedagogical approach*, *resources* (human, material, socio-organisational, moral) and *people* (individual commitment to cross-border collaboration and trade union education, participants).

Subsequent to the overview of (transnational) educational activities in the ROI and their ability to foster representatives' transnational competencies, the last segment explores the engagement of ICTU, SIPTU, Mandate and UNITE in EWC training.

This chapter suggests that labour educational activities in the ROI pay little attention to cross-border concerns, where UNITE appears comparably most advanced. Therefore, transnational competencies remain largely underdeveloped. The major purpose of courses and

¹⁴⁶ The 22 sectors are: Aerospace & Shipbuilding, Automotive, Building, Construction and Allied Trades, Chemicals Pharmaceuticals Process and Textiles, Civil Air Transport, Community Youth Workers and Not for Profit, Docks Rail Ferries and Waterways, Education, Energy & Utilities, Finance & Legal, Food Drink & Tobacco, General Engineering, Manufacturing & Servicing (Gems), Graphical, Paper, Media & Information Technology sector information (GPM & IT), Health, Local Authorities, Manufacturing, Metals (including Foundry), Ministry of Defence & Government Departments, Passenger Transport, Road Transport Commercial Logistics and Retail Distribution, Rural & Agricultural, Servicing & General Industries.

¹⁴⁷ UNITE the Union, *Minutes and Record of the Executive Council*, 17-20 September 2012 in London, <http://www.UNITEtheunion.org/uploaded/documents/EC%20Minutes%20December%20201211-8472.pdf>, accessed 14 June 2015.

seminars is to equip labour representatives and other trade union members with knowledge, skills and competence to improve their day-to-day work. Attitudes such as the willingness to act in solidarity are not officially addressed. Since Irish trade unions do not commit to critical-emancipatory education formally, the value of educational activities for challenging existing economic, political and social structures and emancipating workers from the inequalities and discriminations that structures have brought about appears rather low.

Besides the relatively little participation in educational activities compared to overall membership, transnational education and collaboration remains more a matter of an elite group of union leadership and selected staff and activists as opposed to the masses of workers. Due to the decrease in financial resources and personnel, in particular since the demise of the social partnership, national trade union education appears to be considered more a luxury than a fundament of the Irish labour movement. At the same time, a new fundament might be in the making through the movement's trend away from servicing toward organising as well as the anticipated national Workers' College.

9. Chapter: Trade Union Education in Ireland

Trade union education in Ireland rests on three pillars, or rather two plus one. One pillar is about preparing representatives, shop stewards and full-time staff for their roles. Vaughan (2015, interview) explains this as "developing trade union capacity to be effective". He sees relatively "more movement towards organising" here. The underlying rationale for preparing labour representatives in the firm dates back to the 1970s when Ireland experienced its 'new industrialisation' through foreign direct investment. Labour felt the need to better understand "workplace procedures, industrial relations practices and labour relations institutions, and basic grievance handling techniques" (Croke, 2007: 7).

Another pillar refers to community education, especially for members with lower education to improve their skills in IT and literacy. The number of workers in Ireland who have difficulties reading, writing and calculating is significant (ICTU, 2013b). Other courses may raise self-awareness and progress personal development. This pillar is an effort to provide lifelong learning opportunities (Vaughan, 2015, interview). Twelve unions are affiliated with the Peoples' College for Continuing Education and Training; among them are IMPACT, MANDATE, SIPTU, PSEU and CWU. Participants are 94% Irish and rather mature: only a fifth are below 40. Half are between 40 and 65 (ICTU, 2013b). The Peoples' College may be compared with the Volkshochschulen (peoples' high schools) in Germany.

The last pillar concerns vocational training and has "nothing to do with trade union education at all". The sectoral unions offer training tailored to the professions they represent, for instance, doctors, nurses, teachers, etc. (Vaughan, 2015, interview).

Irish trade union education is supposed to provide “possibilities for an alternative economic and political analysis, especially an alternative to neoliberalism”. Strikingly, social and environmental alternatives are not regarded within the unions’ educational mandates. Nonetheless, seeking alternatives with a “broader view” is paramount. Such a view includes analysing decision-making processes and lines of power. The European dimension and transnational solidarity are “highly important” for adopting this broader view. However, so far, there has been “very little” concern in Irish trade union education for expanding the participants’ perspective, and the pace to change this is “very slow” (Vaughan, 2015, interview).

Due to the lack of resources, trade union education is considered a “luxury” (ibid). At the same time, the demise of social partnership poses a new challenge to trade union officials. For the first time in 30 years, they have to negotiate at both the national and sectoral levels. For doing so, officials need “training in economy, negotiation and collective bargaining, but not necessarily in solidarity” (ibid). Considering the lack in resources whilst being “faced with real challenges at the national base, there is no capacity for European and transnational work” that goes beyond attempts at awareness raising (ibid). The core focus of educational activities, at the moment, is training for shop stewards and health and safety representatives.

Thus, activist and staff training appear a means to establish a new base after social partnerships. Training for shop stewards and health and safety representatives are also easiest to implement and are supported by a legal framework. This framework is an exception in the otherwise voluntarist history of industrial relations in Ireland (ibid).

9.1. Community Education in Ireland

Besides activities in schools, trade union education provides mostly a form of adult education. The form of adult education which has arisen in Ireland, and is predominant in other liberal market economies as well as in Africa, is community education (Connolly, 2010; Rubenson, 2010). The principles of community education are, therefore, likely to have influenced trade union education in Ireland. In fact, as was shown in the previous section (9), community education is a pillar of Irish trade union education. Academic literature on the field is, however, sparse (Connolly, 2003). The White Paper on Adult Education issued by the Irish Department for Education and Science (DES) is the main legal basis for adult and community education in Ireland (Brady, 2010).

Community education in Ireland arose in the 19th century with the purpose of counteracting any form of domination, such as oppression and discrimination, while promoting democracy and social improvement. A creation of radical labour organisations back then, community education aims at including those at the margins of society (e.g., ethnic/religious minorities, homeless, drug addicts, immigrants), empowering the rather powerless (e.g.,

unemployed, early school leavers, disabled, women), and activating people individually as citizens and collectively as a part of civil society (Connolly, 2010; also Olesen, 2010). The Irish Adult Learning Organisation, AONTAS (2015), describes community education as “a process of personal and community transformation, empowerment, challenge, social change and collective responsiveness [...] grounded on principles of justice, equality and inclusiveness”.

Originating from radical labour ideology, Freire’s philosophies play a significant role in community education, in particular his two concepts of conscientisation (developing critical awareness through reflection and action) and empowerment (Brady, 2003; Connolly, 2003, 2010, see chapter 2). Correspondingly, Connolly (2003: 16) argues that “community education is not about training or up-skilling the labour force. While the outcomes may include the entry of people into the workplace, it is as critical citizens, rather than workers or consumers/customers”. For this reason, community education endeavours to transform traditional beliefs (Connolly, 2010).

The focus of community education is local. It is supposed to be a means for mastering the challenges of a given residential area or interest group (Cullinane, 2003). Interest groups can also be transnational, though, like Irish people in the US and elsewhere (Connolly, 2010). Thus, community education centres on the needs of the learner and his social environment. It is both a personal and common good which strives to impact on the individual as well as the collective level.

Given the various possible local needs, Thompson (2002) suggests that community education can be formal, informal and non-formal. Educational offerings may range, hence, from basic literacy to numeracy and health programmes to third level degrees. In Ireland, they are provided by more than 140 organisations nation-wide, mostly statutory (schools, colleges and universities) but also non-for-profit, religious institutions and trade unions (Brady, 2010). Due to this broad spectrum of educational opportunities, community education provides a link between the formal national educational system and popular adult education in folk high schools (Rubenson, 2010).

However, as much as community education can bridge the gaps between what formal national education provides and what individuals and their communities require, it can also reinforce them. Thanks to the very existence of community education, national governance may be discouraged from resolving fundamental structural flaws and the unequal distribution of resources. Broadly speaking, community education is, in many ways, expected to provide local solutions for global problems national politics failed to address (Connolly, 2010; Crowther & Martin, 2010). Community education can, therefore, be both a remedy to and a result of failures in political, economic and social systems.

Essentially, community education requires the belief that citizens and communities which are socially and economically weaker can be empowered to an extent that they make

significant changes. In this context, weaker citizens are educated with the aim to change issues which are actually beyond their control. Community education may certainly, in radical-critical tradition, uncover the root causes of exclusion, domination and 'democratic deficits' (Erne, 2008) and be a motor for social transformation. Sooner or later, however, the motor is likely to be stalled by the powerful windmills which keep currently imbalanced social, economic and political systems alive. In this light, community education appears to administer to a 'mission impossible' driven by an 'illusion of inclusion'.

It is not hard to conclude that, in effect, community education appears a form of adult education that aspires to transformation but achieves adaptation. It seems unsuitable for removing injustices and inequalities. Rather, it helps to avoid fundamental changes. Correspondingly, AONTAS (2004: 19) admits that it's "transforming effects are limited". While the power of the masses might be a factor to overcome the weakness of individual people and communities, participation in adult education is meagre. Since comprehensive national statistics are missing, AONTAS (2012) calculated that, in 2012, roughly 300,000 people attended any form of community and adult education. Considering a population in the Republic of Ireland of about 4.6 million, this is an annual participation rate of approximately 6.5%, which is well below the EU average of 10.5% (see chapter 3).

Another reason for the insignificance of personal and structural transformation in Ireland may be the issue of ideology, which many community groups appear to have lost on their agendas (Connolly, 2003). Moreover, educational activities are not always be able to make participants realise the connection between the personal and social levels. Often, community education principles are applied and implemented inappropriately since many adult education initiatives appear not to be proper examples of community education (ibid).

The Irish Department of Education and Science suggests that the sector's growth has been constrained because of low financial and other resources, disconnection from formal education, especially regarding accreditation and certification and inadequate research support (DES, 2000). Brady (2003) duns the exceptional cases of strategic approach on the part of statutory providers, in particular regarding integrating community education in the wider lifelong learning framework.

9.2. Trade Union Education in Ireland

“For the last 10 to 15 years, most training was delivered by ICTU’s affiliates”. Now, “all of education and training is in transition”. The modification is part of a wider attempt to restructure the whole Irish labour movement, where the level of collaboration is higher, more formal alliances are built and services such as IT and legal aid are delivered jointly. It remains to be seen, however, how radical this restructuring will be. There was a “much more ambitious plan to move to a federal structure like in the Netherlands, but people seem not like to go there” (Vaughan, 2015, interview).

The ICTU Head of Learning, Frank Vaughan (2015, interview), is not happy with the current situation regarding cross-border initiatives. The Irish unions’ participation in EU affairs is very low. Likewise, trade union education in Ireland has “generally a very little transnational component” (ibid). There is a lot of suspicion and distrust among Irish trade unions. “UNITE is exceptional” (ibid). Some unions, like the Communication Workers’ Union (CWU), may be active at ETUF level.

9.2.1. Course Programme

ICTU’s 2015 programme contains 30 different courses.¹⁴⁸ More than half concern IT and Internet skills (16x). The remaining activities include Branch Secretary, Business Studies,¹⁴⁹ Committee Training, Communications (2x), Glass Crafts, Mentoring, Occupational First Aid, Personal Effectiveness, Project Management, Receptionist Skills, Train the Trainer, Training and Development, and Union Representative. As the Head of Learning, Frank Vaughan, explains, there is “nothing on the official training programme” which relates to cross-border work.

Rather, Congress is involved in some transnational projects, for example on social enterprise (including federations in Bosnia, Italy, Spain and Hungary) and consultation and information.¹⁵⁰ A workshop on the 10th and 11th of December 2014 in Dublin was dedicated to TTIP. The first day, called ‘TTIP: Bad for Democracy and Good for Corporations?’ was open for members, affiliates’ officials and the public. On the second day, ICTU invited members and affiliates’ officials to ‘TTIP and European Information, Consultation and Participation’. Key note speakers came from ETUC, the US federation AFL-CIO and the European Commission. The 3-

¹⁴⁸ <http://www.ictu.ie/unionlearning/courses/courselist.html>, accessed 10 June 2015.

¹⁴⁹ We might expect some international topics in this Level 6 Certificate. The six modules are Safety, Health and Welfare at Work; Human Resource Management; Equality and Diversity; Introduction to Irish Employment Law; Collective Bargaining and The Theory and Practice of Negotiation and Introduction to Economics. Only the latter module includes some global context. <http://www.ictu.ie/filelibrary-uj/12846487603775627/brochure.pdf>, accessed 11 June 2015.

¹⁵⁰ The INFORMIA project during 2010 “investigated the nature and extent of information and consultation arrangements in four EU Member States and one candidate country - Bulgaria; Croatia; France; Ireland; and Italy” and was funded partly by the European Commission (O’Kelly & Vaughan, 2014: 1). The follow-up research INFORMIA II involves partners in Bulgaria, Croatia, Cyprus, Ireland, Italy and the UK, and was completed in June 2012 (ICTU, 2015).

day 'Online Campaigning' course in the programme was designed by ETUI and takes place in the DGB educational centre in Hattingen. However, without any regular courses explicitly on transnational concerns, the extent of ICTU's involvement in EU work is "very limited" (Vaughan, 2015, interview).

More activity appears at the global level. As part of the confederation's Global Solidarity project, ICTU has trained, so far, almost 100 Global Solidarity Champions with the aim to build a human resource that participates in future collaboration with the developing world and advocates international solidarity in the ICTU and other trade unions. Since 2009, an annual Global Solidarity Summer School has been held. Already approved by the national qualifications authority, Quality and Qualifications Ireland (QQI),¹⁵¹ a course on 'Global Development' is currently in the making (Nolan, 2015, interview). "The purpose is to equip the learner with the knowledge, skill and competence to analyse and evaluate global development approaches and strategies".¹⁵²

SIPTU does not have a set annual programme anymore. Instead, the trainers sit down with the five divisions to discuss their needs on training for the workplace, equality and health and safety. In Services, last year, approximately 20 courses were scheduled. Since the recession, the duration has been reduced from 5 to 3 training days because employers have been increasingly rejecting paid time off. Courses for staff concern mostly organising as well as current issues. One educational activity, for example, suggested to staff what (not) to say in regards to the Marriage Equality Referendum on 22 May 2015 (O'Brien, 2015, interview).

Courses available on demand may include Induction for New Union Representatives and New Officials, Shop Steward and Union Activist Skills (basic/advanced), Effective Meetings, Safety, Health and Welfare (basic/advanced), Trade Union Organising, Trade Union Studies, Computer Training, Communications, Team-working, Union Learning Representatives, Occupational Pensions, Continuous Development for Union Officials and Administrative Staff and Sector Committee training (SIPTU, 2013).

Apart from equality modules and the Certificate in Trade Union Studies, European and international contents are not officially part of the programme. Nonetheless, trainers try to include these dimensions in their ways of delivering the courses, if possible (O'Brien, 2015, interview).

IMPACT's training offer is limited and does not concern cross-border issues. Newly introduced in 2011, the union offers only one course for workplace representatives. Activist Training

¹⁵¹ QQI have replaced the former Further Education and Training Awards Council (FETAC).

¹⁵² Component Specification Global Development Level 6 (6N4126), p. 4, unpublished document, provided by Margaret Nolan on 16 June 2015.

comes in two levels: basic and advanced. Each course includes four modules which are given on 4 days over the course of 3 months. The modules are spread because workers have difficulty getting time off for four consecutive days.¹⁵³ Besides workplace and activist training, union members can take a health and safety course in collaboration with ICTU and TEEU (Callinan, 2015, interview). The union seems, however, willing to increase its educational offers: "IMPACT's training sub-committee is committed to [...] expand the range of courses available to activists, including in conjunction with other unions" (IMPACT, 2015: 28).

Mandate's general training programme consists of 12 courses for elected activists (shop stewards) and 10 courses for union staff. All courses are 3 to 5 days long and take place in the Republic of Ireland several times. Shop stewards may develop further in union representation (basic/advanced), communication, basic and intermediate IT skills, pensions, health and safety, trade union studies, and management courses. Additional educational activities may include campaign information days, such as Fair Shop, and company-specific union representative training, for example for Tesco and Boots. Creatively, the union announced, for 20 January 2015, a play in the Town Hall Theatre Galway titled 'A fair retail fairytale? Don't make me laugh!'

Courses that have a transnational aspect are 'Equality and Diversity', which both union members and staff can attend. "The course aims to equip participants with the knowledge and skills to communicate and work in a multi-cultural environment and to actively encourage integration in the workplace".¹⁵⁴ A 3-day senior course for union representatives, which is not mentioned in the programme yet, was newly invented in order to address more experienced shop stewards. Through learning about the 'history of trade unionism', the 'emergence and development of the market system' and the 'impact of globalisation' and 'free trade and open markets in a modern society',¹⁵⁵ the aim of the senior course is to raise "political awareness".

The 'Partnership Programme' cannot be counted as transnational as such. The goal of the course 'Working through Union/Company Partnership Forums' is to improve communication between employers and employee representatives. However, through getting management and workers at one table, this educational activity is seen as the very first stepping stone towards an EWC. Amongst others, several mutual benefits of EWCs are outlined to employers, one of which is seen in an additional forum for grievance procedures. The attempt to progress employers to EWCs from here "is on the agenda all the time" (Morrissey, 2015, interview).

Outside the norm, the union presented, on 10 July 2014, 'Blood Sport – A Film on the 1984 Anti-Apartheid Strike in Dunnes Stores' in memory of the emblematic 2.5-year strike of 12

¹⁵³ The consequence are higher administration costs for the union (Callinan, 2015, interview).

¹⁵⁴ <http://www.mandate.ie/Divisions/DivEvents.aspx?eid=416&did=5>, accessed 26 July 2015.

¹⁵⁵ Mandate Trade Union, *Shopfloor*, May 2015: 15.

workers in front of the Henry Street branch who rejected handling South African products in the supermarket.

In general, the training programme is meant to “reflect [...] Mandate’s strategic priorities of recruitment and organisation, in moving from a servicing to an organising trade union” (Morrissey, 2015: 2). The course offer has not changed over roughly six to seven years (Morrissey, 2015, interview).

TEEU (2015) has scheduled 4 different courses in 2015 which are offered on 4 and 5 days, often repeatedly, in the Dublin head office and the regional offices in Cork, Limerick and Waterford. The courses are on ‘Trade Union Representation Skills’ (4x), ‘Workplace Negotiation Skills’ (3x), ‘Safety Representation’ (2x) and ‘Organising Skills’ (1x). With the exception of the first, none of these courses concern cross-border issues. Only in Trade Union Representation Skills is there a module on ‘Equality and Diversity’ (Heading, 2015, interview). The module includes discrimination and racism in Ireland and Irish equality legislation and it refers to the EU Charter of Fundamental Rights, OECD Guidelines for MNCs and the ILO Decent Work Agenda.¹⁵⁶

The only European educational engagement was started in 2012 in regards to the train the trainer course in Project Management offered by the ETUI. Heading attended the first seminar in April together with other trade unionists from all over Europe, like Sweden, Lithuania, Austria and the UK. He acted as a trainer in Ireland for the first time in December 2013. Another course was held in Ireland in 2014, but none is scheduled for this year. Heading (2015, interview) assumes a two-year cycle for Project Management courses.

With only four different courses on offer, the union’s claim “to take a leading and active role in the provision of [...] education and training” seems, at present, an aspiration. Likewise, Heading’s (2015, interview) description of TEEU as “just a small union with limited resources” does not underpin a leading role. TEEU seems, nonetheless, active. For example, they are in the process of revalidating their modules under the new Quality and Qualifications Ireland (QQI) body; they aim to expand workplace representative training in their six regions around the Republic; they published, in April 2015, a revised training manual for safety representatives; and they plan to refurbish and replace equipment for technical training.¹⁵⁷

¹⁵⁶ TEEU training booklet: Equality & Diversity – A Guide for TEEU Workplace Representatives, 34 pages. Provided by Sean Heading.

¹⁵⁷ Internal document: Technical, Engineering and Electrical Union – Education and Training, 2015. Provided by Sean Heading.

Other courses that may be on offer are 3 computer courses,¹⁵⁸ 10 special technical skills courses,¹⁵⁹ Employment Law and Trade Union Studies for workplace representatives and 8 miscellaneous.¹⁶⁰ Therefore, TEEU may provide, in total, 27 courses. Four currently await QQI approval.¹⁶¹

UNITE members in the Republic of Ireland are offered 7 courses: two courses each for workplace as well as health and safety representatives, one on pensions, equality and diversity, and a staff training for branch secretaries and officials. All courses are 3 to 5 consecutive days in Dublin. Representatives may take the pension, workplace and health and safety activities in the UK. Further available in the UK are 15 courses concerning Dealing with Redundancy, Incident Management and Investigation, Information and Consultation and Pre-Retirement. Eight of them deal with equality in terms of the Equality Act of 2010 as well as different social groups like women, retired, disabled, young and lesbians/gays.

With respect to transborder issues, UNITE also offers the usual course on equality and diversity in general. One equality course considers the Black and Asian minorities, whilst another looks into 'Dignity at Work' (harassment, discrimination, bullying). Another activity investigates 'Organising and Bargaining in the Global Economy', in addition to an introductory course to EWCs. Since 2012, Dan Gallin's Global Labour Institute hosts a Summer School which UNITE members may attend. In short, 5 educational activities of 27 in total for UNITE members in the ROI include cross-border issues.

Additionally available to union members is the course programme of the General Federation of Trade Unions (GFTU) Educational Trust. The Trust provided, in 2015, 12 courses for representatives and shop stewards, yet without any transnational concern.

UNITE's educational activity in Ireland is quite low compared to in Britain. Between January and June 2014, 24 (3.8%) educational activities that took place in the ROI and NI totalled 630.¹⁶²

¹⁵⁸ IT skills, Computer Applications, Data Entry.

¹⁵⁹ Industrial Electrical Systems, Industrial Hydraulic Systems, Industrial Pneumatics Systems, Mechanical Maintenance Skills, Plant Facilities Maintenance, Preventive Maintenance, Process Measurement & Control, Production Line Setup, Programmable Logic Controllers, Refrigeration Principles & Systems.

¹⁶⁰ Communication Skills, Problem Solving, Safety & Health, Supervisory Management, Total Productive Maintenance, Teamwork, Train the Trainer, Workplace Facilitation Skill.

¹⁶¹ Training and Development Special Purpose (QQI level 6), Industrial Electrical Systems (QQI level 6), Teamworking (QQI level 5), Supervisory Skills (QQI level 6). Internal document: Technical, Engineering and Electrical Union – Education and Training, 2015. Provided by Sean Heading.

¹⁶² Unite NOW! EC Report September 2014, <http://www.unitenow.co.uk/index.php/documents/documents/unitenow-executive-committee-reports/332-ec-report-september-2014/file>, accessed 14 June 2015.

9.2.2. Transnational Courses

The local focus typical of Community Education is clearly present in Irish trade union education. What is the community for community education is the workplace for trade unions. The workplace may be in companies (representative training) and union organisations (staff training). Merely a local educational focus, however, contradicts involvement in cross-border collaboration and developing transnational competence for it. Also hampering the development of transnational competence is, like community education, trade union education, which seems to have lost trade union ideology. Ideology is, however, essential to transformative competence, in particular to the utopian dream of rekindling international labour solidarity.

9.2.2.1. Significance of Transnational Trade Union Education

Due to the educational focus on the workplace, labour educational activities do not appear destined to go beyond national borders. In fact, from based on the programmes, Irish trade unions pay very little attention to transnational concerns in their courses. Cross-border issues are usually addressed through courses or modules on equality and diversity and may be integrated into certificate and third level degree courses. Global political education has been linked, so far, exclusively to developing countries through the ICTU Global Solidarity programme. Mandate is about to introduce a course that would provide a broader political perspective. However, this course targets the more experienced lay representatives instead of shop stewards and other trade union members.

A transnational union itself, UNITE seems the most developed in terms of transborder contents. It seems to be the only union with an international department. In addition to the usual equality and diversity course, the union offers courses on organising and bargaining in the global economy, Black and Asian ethnic minorities as well as four EWC cross-industry seminars per year, besides regular EWC body training. Also, the International Summer School of the Global Labour University is open to members.

Due to the rather little attention paid to cross-border concerns in educational activities as well as the very low rate of participation in general – figures available point to a yearly participation rate of around 2.5% of total ICTU membership – transnational collaboration and education appears an elite activity of selected trade union leaders and staff. Leaders can be involved in ETUC and ETUF committees and may be more or less active in their international affiliation duties. Prominent is also collaboration through cross-border projects, such as the ETUI and other national and international trade unions. Collaboration with the ETUI appears quite regular, in particular through ICTU. However, learning from transnational activities appears not to be mainstreamed into the union and down to grassroots.

Questionable is, moreover, whether transborder relations deepen through visits and joint projects and whether travels and transnational collaboration remain disconnected, once-off

actions. Moreover, lay representatives and trade union staff may participate in ETUI and ILO courses, but what about the vast majority of members who neither have any activist function nor anticipate one in the future? Learning from transnational educational activities appears not to be mainstreamed down to the grassroots, mainly as a matter of lacking resources.

A huge corruption scandal around trade union and government leaders' international travels, meanwhile, created suspicion among the grassroots around cross-border collaboration. In addition, state funding has decreased significantly since 2008. ICTU affiliates do not receive any direct financial support from the Irish government anymore, but only indirectly through the partly employer-influenced Skillnet. Diminished external funding, decreasing income from membership fees and the breakdown of social partnership as a fundamental institution make it difficult to invest in outside 'bread and butter' issues, and transnational education and training seems viewed as such. Unless EU or other funding is granted, trade unions put priority in developing their activists and staff for the local and national trade union agendas, usually at no cost to the participants.

However, even national trade union education appears to be considered more a luxury than a fundament of the Irish labour movement, as the share of membership fees spent does not exceed 1.7% in the union sample. Moreover, both demand and investment in educational activities follows the economic cycle. Training activities are rather high in bullish years and decrease considerably in bearish years. In other words, economic booms stimulate education, whereas stagnation and recession seem to be an education killer. If education and training were considered fundamental to the Irish labour movement, we should expect higher demand by the members and higher investment by the trade unions.

Indeed, the demand in educational activities has increased during the last years as a result of the unions' shift from servicing to organising and the members' greater awareness of the need for education and training. The austerity crisis may have temporarily hampered union members from asking for time off, and the absence of statutory paid educational leave is a problem. Unless unions like Mandate have achieved respective institutions in their collective agreements, trade unions have to negotiate leave on a course-by-course basis. During boom times, employers seem more generous in letting employees develop further.

Fluctuation also appears as a current feature of the Irish labour movement. Many unions are in structural transition from servicing to organising, although in different stages. As part of this and in order to use resources more efficiently, trade union education is currently being restructured from decentralisation to more centralisation through an all-island Workers' College. Whether the College will be opened according to plan in 2016 depends on how inter-union rivalries are solved. The rivalries concern the competencies and course offers of the existing and – apart from SIPTU College – modern educational centres. Also, accreditation of prospective courses by the QQI is at issue. This restructuring of education and training in

Ireland could, however, be the first step towards a learning pathway from a local to a global level.

9.2.2.2. Transnational Competence Profile

Here, the educational activities of ICTU, SIPTU, IMPACT, Mandate, TEEU and UNITE are viewed through the framework of Transnational Competence introduced in chapter 4. This section assesses the extent to which the trade union education in Ireland fosters each of the six sub-competencies: i.e., transformative, analytic, communicative, emotional, creative/imaginative and functional.

However, like the unions in Germany, Irish trade unions do not have any structured description of trade union education comparable to the ETUI ETUR and EWC learning pathways. It is, hence, difficult to evaluate the extent to which Transnational Competence is nurtured. Moreover, transnational educational activities are hardly present.

9.2.2.2.1. Analytic

Trade union education in Ireland certainly develops course participants' analytic competence, for the provision of knowledge is core. However, apart from equality and diversity courses and modules in the Certificate in Trade Union Studies, European and international contents are not officially part of the educational programme. Therefore, analytic competence must remain rather bound to local and national concerns. We might, however, find course contents that facilitate transnational analysis in ICTU's special education for Global Solidarity Champions.

9.2.2.2.2. Functional

Trade union education in Ireland develops some functional competence, as the provision of skills is another key to it. Labour representatives are equipped with skills in negotiation, communication, project management, occupational first aid, personal effectiveness, effective meetings, conflict management, dealing with redundancies and grievances, etc. However, this skill training is not explicitly directed to transnational matters.

Nonetheless, overseas trips provide both participants and trade union staff who organise them the opportunity to network across borders. Staff in ICTU, SIPTU, IDEAS and Mandate may gain from participation in transnational projects. Staff in ICTU, Mandate and TEEU benefits from being involved in collaboration with the ETUI. TEEU, SIPTU, IBOA and PSEU aim at improving their project management skills through sending their education heads to the ETUI train the trainer course. Those involved in managing affiliation with European and global unions and international social movements (like Mandate) are likely to improve their functional competence, too. UNITE staff, moreover, is involved in collaboration with the Global Labour Institute (GLI).

As we will see later, UNITE is active in EWC training in terms of both cross-industry courses and representative body training, where course participants learn what is needed to make EWCs run well. Courses taking place in other countries are certainly beneficial for functional competence, too. UNITE members in Northern Ireland and the Republic of Ireland may travel to activities in Britain, and ICTU offers an Online Campaigning course in Germany (DGB BW Hattingen). ICTU as well as Mandate have organised activities with cross-border contents as exceptional events outside the educational programme.

9.2.2.2.3. Communicative

With English as their native language, Irish people have a great advantage in communicative competence, not only for talking to management globally and reading scientific and other articles, but also for transnational teamwork. Arguably, Irish workers may easily collaborate at least with other Anglo-American countries (Australia, Canada, New Zealand, UK, US), where cultural differences are not too significant, either. More different might be communication with people from countries where English is the official second language, such as in Malta and India.

Trade union education in Ireland does not include any other language or cross-cultural communication courses. However, we cannot expect Irish workers to communicate naturally in open and honest dialogues involving the four human elements and all six senses. Likewise, active listening and the language of different target groups at different levels must be learned.

9.2.2.2.4. Creative/Imaginative

Regarding creativity and imagination, very little can be found. Alternatives to neoliberalism and political decision-making are within the understanding of trade union education, as we shall see later on, but no course programme points to courses that deal with this topic. Deeper analysis into the course work would be necessary in order to evaluate the extent to which theory is put into practice and whether alternatives to social and environmental issues are anticipated. Deeper data would also be needed to reveal whether innovative thinking is also encouraged in terms of allies, target constituency, contestation spaces, union types and strategies, reorganisation of labour, New Labour Internationalism (NLI) and other issues inside the Irish labour movement. Since European and global labour issues are only occasionally touched upon, Irish trade unions seem not to be envisioning a cross-border/regional/global 'community of fate' of both labour and society.

9.2.2.2.5. *Emotional*

Indicators for emotional competence are, likewise, hard to find. Merely the courses and certificate modules which deal with equality and diversity seem to relate to this category. UNITE diverts a bit from the mainstream when they offer a course particularly on Black and Asian minorities. Inequality and empathy might also be elements in the ICTU Global Solidarity Champion course. This course, as well as the supporting projects in poorly developed countries, however, give the impression that solidarity is seen in terms of the developing world rather than in terms of labour in the more developed countries. Another question is how far the modules and courses not only distribute knowledge and skills but also address the emotional side of equality and solidarity overtly in order to build a perception of (in)justice. The perception of injustice is essential to mobilisation (see chapter 2).

As will become apparent from the section on pedagogical approaches to understanding trade union education, developing increased confidence to voice and debate interests is one aim of Irish trade union education. Since the provision of knowledge and skills is key to Irish trade unions, they seem to believe that feeling more confident is a result of knowledge and skills training and does not require direct educational attention.

9.2.2.2.6. *Transformative*

Aspects of transformative competence are also difficult to detect in the educational programmes. In the last ICTU (2013b) annual report, social democracy, justice and human equity are all important to the Irish trade union movement. Ecological sustainability, however, does not appear at issue.¹⁶³ The ICTU annual report gives, furthermore, the impression that long-term gains are sought. The revolutionary potential of these aims is, however, fairly questionable, since trade unions in Ireland are not committed officially to critical-emancipatory education. It depends mostly on the willingness and capacity of the tutor how far participants are facilitated to question capitalist power structures and allegedly democratic institutions.

To what extent (inner) wisdom is developed and shared in the educational activities cannot be answered straightforwardly. Since trade union education is perceived as a functional tool, the amount of wisdom building it offers is probably insignificant. Trade union values might be included in any course even when the course title does not suggest this. Yet, the development of a willingness to think, feel and act as a movement appears rather weak nationally and, even moreso, transnationally. Irish trade unions are in a phase of 'post social partnership restructuring' and perceive no resources left for rekindling the utopian vision of international

¹⁶³ The disrespect of ecologic sustainability among trade unions and their education corresponds to the Irish people's generally low and, apparently, only recent concern for the environment. Waste separation and recycling seems not a habit for most Irish households. Waste that is not recycled is usually put to landfill (Watson, D. (2013) *Municipal Waste Management in Ireland*, file:///C:/Users/h/Downloads/Ireland_MSW.pdf, accessed 27 July 2015; also author's own experience.) The author has also observed several times that, instead of switching it off, people leave their car engines on while waiting for something or someone.

solidarity by creating a higher spirit of transnational unity. Likewise, such higher aims as liberation from oppression and emancipation towards humanisation and happiness seem not on the agenda in view of the construction work necessary at the fundamentals of the movement.

In sum, Irish trade unions do not seem to build workers' transnational competencies deliberately. Rather coincidentally, they dip into functional competence and slightly touch upon communicative competence. Yet, the benefits of overseas trips, transnational project management and collaboration with the ETUI, ETUFs and GUFs remain reserved for the limited number of involved trade union staff instead of the majority of workers. Communicative competence comes naturally as a matter of the English mother tongue, but it cannot be expected to naturally go beyond this. Transnational competence development in creativity, imagination and emotions seems rather covert in Irish trade union education, if present at all, and requires further research. The same is true for transformative competence.

9.2.3. Education Triangle: Distribution of Knowledge – Attitudes – Skills

Similar to Germany, trade union education programmes in Ireland concentrate on developing knowledge, skills and competencies: in other words, the education of head and hand. The vast majority of educational programmes focus on training for workplace/health and safety/equality representatives and pension trustees. These activists are equipped with the tools they need for enforcing workers' limited national statutory rights and handling employers' labour-hostility. The tools on offer are, usually, negotiation, communication, project management, occupational first aid, personal effectiveness, effective meetings, conflict management, dealing with redundancies and grievances. University may be accessed through a Certificate in Trade Union Studies. Only a few course titles and certificate modules indicate that inequalities and discrimination are discussed, mostly through the subjects of equality and diversity.

Some educators argue, similarly, that labour representatives develop trade union values like solidarity and fairness 'on the job' through their daily work. This can apparently not be taken for granted, though, as other colleagues' observations indicate that membership lacks emotional investment in what is happening to brothers and sisters abroad. As put forward in chapter 2 and underpinned by ICTU (2014), solidarity arises through a combination of affect and intellect, i.e. both heart and head. Therefore, trade union education in Ireland appears ill-prepared to develop workers' attitude of transnational solidarity.

Even in country, the IMPACT General Secretary believes that trade unions' overall educational challenge is to form people's attitude towards collectivism. This means conversely that trade union education in Ireland has so far failed in developing labour's attitude in general, and transforming the neoliberal advocacy for individualism in particular – even though other educators suggest that attitudes towards building the trade union and solidarity are trained on the course.

With this in mind, the courses which Irish trade unions offer appear of rather low value for questioning existing economic, political and social structures. Neither seem the training programmes majorly suitable for improving cross-border collaboration and action. The broad disregard of critical political education as well as developing labour attitudes in official trade union education goals may however be partly compensated by tutors who are committed to applying critical pedagogy and politicising (trans)national issues. In other words, there may be more to the inside of educational activities than can be seen from the outside. This is matter of course planning and delivery, though, which require further research.

9.2.4. Course Planning

Until recently, IMPACT has not followed any educational strategy. Since the 1980s, "people dictated what training they want", be it shop stewards or union staff. The decision to stop this unstructured approach to education fell in mid-2011 on the background of decreasing membership and union power.¹⁶⁴ The Training Committee realised that the union needs new courses for workplace representatives and developed the abovementioned Activist Training. Just in April 2015, it was decided to bring in training more strategically for strengthening organisational capacity and preparing for a better future as well as membership recruitment. However, change is "very slow". "People agree with the principles, but do not want to be part of the implementation" (Callinan, 2015, interview).

UNITE has a Curriculum Development Team consisting of 8 people who meet 4 times a year (Moctonian, 2015, interview – also a member of the team).

Mandate gets their ideas for courses from the participants' and trainers' suggestions, staff training activities at ETUI and Verdi and through insights from conference attendance (Morrissey, 2015, interview).

9.2.4.1. Future Educational Activities

The ICTU Education and Training Committee conducted a non-representative Training Needs Analysis (TNA) in 2012. 905 union members filled in the survey. Similar to the author's ETUI survey, "the TNA gave an important insight into the particular and varied training needs of representatives, officials, organisers and office-holders of trade unions" (ICTU, 2013: 113). Thus, the survey was obviously issued to union activists only. It follows conversely that Congress' education and training programme is not tailored to the masses of union members,

¹⁶⁴ So far, Impact understood itself as a servicing union. It aimed to provide industrial relations services to members and organisational health to itself. Employment rights courses should make the organisation fit to compete with the legal system. However, the steady and exponential growth in membership since 1999 turned in 2010. Since then, Impact has lost roughly 8,000 members and is down to 56,800 in 2014. The number of staff has maintained, at the same time. Because of the significant decline in membership, the increasing FDI density and attacks on unions, Impact wants to follow the American unions' trend in organising (Callinan, 2015, interview).

but to the small circle of workplace representatives and activists who are expected to speak for and mobilise the masses.

The topics which the surveyed requested most are portrayed in table 9-1. The topics give us a great impression on the day-to-day business of a labour representative in Ireland, on the one hand, and an indication of representatives' current weaknesses, on the other.

Putting employment law and conflict management first, the demanded topics formidably reflect the adversarial nature of industrial relations in Ireland. Moreover part of a representative's 'job requirement' appears organising, communication, grievance handling, meetings, IT skills, team-working, some economic understanding and negotiation/bargaining. Striking is that, overall, labour representation in the firm must be a quite stressful job, as survey respondents ask for skills in stress management and personal wellbeing.

As was a result of chapter 8, representatives seem too busy with their day-to-day work and managing themselves within the capitalist structures. Therefore, representatives' view obviously concentrates locally on their employer, nationally on the legislative framework and personally on themselves. For thinking critically-emancipatorily about wider social and political issues such as the European Union, the European labour movement, international labour solidarity, global hunger and poverty, the humanisation of work as well as economic and environmental issues like global capitalism, TTIP, ecologic pollution and destruction, etc. seem no free capacities.

Table 9-1: **ICTU Members' Most Wanted Course Modules**

Topic	Votes	% of Total Responses
Employment Law	428	47.3%
Conflict Management	422	46.6%
Organising Skills	417	46.1%
Communication Skills	389	43.0%
Grievance Handling	382	42.2%
Running Effective Meetings	359	39.7%
Communications and Media Skills	343	37.9%
Effective Team Work	342	37.8%
Basic Economics for Trade Unions	340	37.6%
Workplace Negotiation/Collective Bargaining	335	37.0%
Managing Stress & Personal Wellbeing	332	36.7%

Source: ICTU (2013: 113); own illustration

SIPTU trainer O'Brien (2015, interview) proposes that courses regarding politics and economics including EU and globalisation would be needed in the future.

IMPACT's Deputy General Secretary sees four items regarding the future of trade union education and transnational collaboration: strategic integration, proper project management, exploitation of EU funding and language training. In addition to this special knowledge and skills, trade unions' overall educational challenge would concern attitude, namely "to get people thinking in terms of collectivism" (Callinan, 2015, interview). This means conversely that trade union education has so far failed in developing labour's attitude in general, and transforming the neoliberal advocacy for individualism in particular.

9.3. Challenges to (Transnational) Trade Union Education

Applying the analytical framework of part II, the factors challenging the development of transnational competencies can be related to the *understanding of trade union education*, the *pedagogical approach*, *resources* (human, material, socio-organisational, moral) as well as *people* (individual commitment to cross-border collaboration and trade union education, participants).

9.3.1. Understanding of Trade Union Education

Trade union education in Ireland is understood majorly as union capacity building. Besides union staff training, the main concern of trade union education is therefore facilitating labour representatives and union activists at company level. In addition, trade unions are involved in community education through offering basic literacy courses such as in IT and English, as well as financial donations to respective institutions. Vocational training is not within the understanding of trade union education, but Irish trade unions engage in this field too.

The purpose of trade union education is to identify alternatives to the present economic and political circumstances, especially in view of neoliberalist ideology. Social and environmental alternatives, however, seem usually not of likewise important concern. Building a wider perspective is vital for envisioning alternatives, and Irish trade unions acknowledge that transnational trade union education is essential for so doing. However, the acknowledgement of the need for a broader view and transnational trade union education is not followed largely by action. It follows that Irish trade unions must more fail in meeting their educational purpose than fulfilling it.

Irish trade unions consider the lack in resources (Callinan, 2015, interview; Heading, 2015, interview; O'Brien, 2015, interview; Vaughan, 2015, interview) as well as the breakdown of social partnership as a substantial challenge to expanding their educational agendas (Vaughan, 2015, interview). In addition to financial shortcomings and the turmoil which comes with institutional change, it seems a result of trade unions' attitude towards education and training if they do not invest more and more purposefully in it: "any organisation that cuts education in bad times does not see education as a basic but as a luxury" (O'Brien, 2015, interview).

Arguably, this attitude can be transferred also to people who do not invest in their education even in good times. During the social partnership era, trade union officials have lost their negotiation skills, because not much was negotiated locally, where the older ones have meanwhile retired (O'Brien, 2015, interview). Workplace and other representatives have been busy with enforcing in the company what had been agreed at national level. In other occasions, grassroots may be motivated to attend classes, but union management might want to invest in allegedly more important items.

The "bread and butter" of SIPTU's education and training is to create activists and develop members' political awareness (O'Brien, 2015, interview). Therefore, the College strives to give both staff and members opportunities "to improve their skills and knowledge [...] so that they can effectively contribute to the Union's Organising agenda [...] and achieve their full potential as workers and citizens" (Croke, 2007: 7/8). SIPTU General Secretary, Joe O'Flynn (2007: 3), elaborates the College's ambition similarly as "to develop members' awareness of society, boost their self-confidence and communication skills and generate a firm commitment to engage in organising activity to achieve an agenda for change". This ambition is attempted to be achieved through a programme focusing on industrial relations skills and formal qualifications valuable for lifelong learning (ibid). However, industrial relations skills and access to formal further qualification appear hardly enough a space for discussing broader economic, political, and social issues with a view to alternatives and bring about an 'agenda of change' which is implemented subsequently.

For IDEAS, education is a means "to improve workers' life". Since "trade unions can achieve more improvement", education is a means for trade unions to organise the workers of Ireland so that they get a fair share of economic wealth, to improve workers' standard of living and providing them full equality and opportunities for future employment. This would require competencies at firm level such as pay negotiations, health and safety, etc., as well as competencies to influence the political level in companies and the government (Kelly, 2015, interview).

"Mandate's mission is [...] enhancing the skills and capabilities of members, activists and union staff" (Douglas, 2015: 2). Elsewhere is mentioned "skills, knowledge and competencies".¹⁶⁵ In so doing, the union strives to "build not only trade union capacity, but also to enhance [...] members' personal development". Learners shall be supported and enabled "to realise their full potential". The General Secretary, John Douglas (2015: pp. 2–3) obviously proposes that trade union education is a win-win for both the union organisation and the individual, because both can develop further.

¹⁶⁵ Mandate Trade Union, Look Up: *Shop Steward Manual & Guide to Employment Law and Trade Union Law*, Dublin: Mandate Organising and Training Centre, p. 7.

However, the “portfolio of skills and competencies” which union members are supposed to build is for “use in their day to day work” (ibid). In other words, personal development is not understood holistically as a human being in and outside work, but focuses merely on one aspect of human life, namely members’ role in an organisation. Education and training is hence seen as a means to develop collective representative qualities and individual employability. What about the members’ role as consumers? What about the members’ role as a citizens of national, European and global society? What about members’ role as part of nature? What about members’ role in the humanisation of man? Where are members supposed to learn about themselves and their environment in a broader and deeper perspective? In community education?

Moreover, as raised earlier in regards to the Congress Centre Network, attitudes seem irrelevant and hence not inside the understanding of trade union education. At the same time, Mandate is member of Trade Union Friends of Palestine (TUFPP), which was set up in 2007 and falls under ICTU policy. At a meeting in March 2015, which also the union’s General Secretary attended, the TUFPP chair, Mags O’Brien, called on Irish trade union activists to support the Palestine trade union movement and get into direct contact with people there. Obviously, up to this point, the TUFPP had remained an elite project where trade union leaders believed that money donations were enough of international solidarity. But, it is not. O’Brien maintains that “more needs to be done by reaching out to our membership”. For membership reaching out to brothers and sisters in Palestine, subsequently, she suggests that people must become “emotionally invested in what is happening there”. This would be essential to “change things” (in Creaney, 2015). Similarly, ICTU (2014: 19) proposes that “solidarity ... is about enabling the emotional and intellectual recognition”, i.e. both the heart and head. How can emotional investment for transnational issues be created among grassroots if Mandate and other trade unions disrespect education of attitudes respectively the heart?

Generally, the benefits of trade union education are “to learn from other representatives’ expertise, to share war stories as well as best practice, to give vulnerable workers the tools to counteract their exploitation”. Trade unionists become “more confident to raise motions and debate things, more political and more active on workplace issues”. Since the opening of the Mandate training centre, significant changes in the members’ level of activity are visible (Morrissey, 2015, interview). Similarly, Nolan (2015, interview) has observed in her trainings for Mandate and INMO that the quality of attendants’ knowledge and participation has increased and “a sense of pride in the union” has evolved.

One official objective of UNITE is “to promote education and training; both vocational and industrial and otherwise as conducive to [the other] objects”. Therefore, the Executive Council

shall “provide training for lay representatives, activists and [the union’s] employees”.¹⁶⁶ For the Education Director, Jim Mowatt, education is essential to building an effective union as it contributes to creating a critical mass.¹⁶⁷

In sum, trade union education in Ireland seems understood functionally as a tool to develop capacity for trade unions as well as labour representatives to raise, negotiate and enforce workers’ interests and rights in the company. Trade union members are supported in their capacity as employee. Capacity is built through providing knowledge and skills. After the breakdown of social partnership, trade unions and representatives are even more in demand than before to represent workers’ interests, and shortcomings in representative capacity reveal now. Despite the obvious gaps in labour’s capacity, trade union education appears perceived as a luxury, because resources are needed to rebuild the movement. Appropriate attitudes like solidarity seem presupposed, so developing them sounds likewise a luxury.

9.3.2. Pedagogical Approach

Trade unions in Ireland do not commit explicitly to critical-emancipatory education. Freire’s principles may be applied by the tutors, but they are “not overt” in the courses (Nolan, 2015, interview).

“Trade unionists are practitioners who need interpersonal and communication skills, analytical and listening skills. You must start where the workers are at, not the union, and use a simplistic language that relates to them. From there, you can build solidarity and broaden their view”(ibid).

Therefore, wider issues as well as reference to trade unions’ key priorities and international activities (e.g. Clean Clothes Campaign in Mandate) in addition to news from the sector abroad are made during the educational activity, even though the course titles would not indicate this. The course titles are held practical to attract trade unionists in their pursuit for practical knowledge and skills. Attitudes such as ‘how to build solidarity’, ‘how to build your union’ are trained on the course (ibid).

To the contrary, Kelly (2015, interview) holds that IDEAS – SIPTU’s independent research and training organisation – develops “knowledge, skills and competencies [whilst] attitudes are taken for a given”. He presumes that representatives develop attitudes at work over the years. Nonetheless, IDEAS’ educational activities include critical debate and apply active learning methods, such as group work and exchange (ibid). Therefore, “participants are not overburdened with excessive theory and get practical, relevant knowledge and skills that can

¹⁶⁶ UNITE the Union Rule Book (2012), available on https://www.UNITetheunion.org/about_us/structure/UNITE_the_union_rule_book.aspx, accessed 14 June 2015.

¹⁶⁷ UNITE the Union, Minutes and Record of the Executive Council, 3-6 December 2012 in London, <http://www.UNITetheunion.org/uploaded/documents/EC%20Minutes%20December%20201211-8472.pdf>, accessed 14 June 2015.

be applied immediately (ibid). These “down to earth courses help [...] participants increase confidence through the development of skills, knowledge and attitude”.¹⁶⁸ Evidently, there may be an inconsistency between what is written on the Institute’s website and how far IDEAS’ courses develop attitudes indeed.

SIPTU describes their approach “student-centred, with much peer learning”. Corresponding to the perceived absence of hierarchy in class, the trainers are not called trainers or lecturers but tutors. On the question of the underlying educational philosophy, O’Brien referred to Freire. “As an ‘Organising College’, students are motivated through a process of empowerment that is imbued with an ideological commitment” (Croke, 2007: 9).

There may however be a discrepancy between theory and practice. As will be shown later, nowhere in the aims of SIPTU College are attitudes explicitly mentioned. How is learners’ ideological commitment developed then? Eventually, it depends on how the tutor delivers the material (O’Brien, 2015, interview). Most of SIPTU’s tutors are from the Left, “not necessarily communist”, though (ibid). We must also bear in mind the “special [conservative] ethos” which the Catholic Church has created in Ireland. Thus, even 10 years ago, tutors would have had a more Christian-Catholic view (ibid).¹⁶⁹

It follows that critical pedagogy can be found in SIPTU College, but is not standardised. Among tutors and union management may also have remained people who would not perceive critical debate appropriate.

All SIPTU courses are face-to-face without any online learning blend. It is currently investigated, however, how online learning could be utilised more. This was not only useful on the background of the difficulties in getting paid educational leave, but may also attract younger people. O’Brien (2015, interview) had initiated to look into online learning already 6 years ago, but “it went sideways”. On the one hand, Sylvester Cronin, who became Head of College in 2009, had to “find his way” (ibid). On the other, decreased funding made it “difficult to look into anything outside the norm” (ibid). Nowadays, online learning is cheaper to realise and has become normal. Thus, SIPTU did not exploit its tutor’s visionary thinking and missed to become a trendsetter.¹⁷⁰

¹⁶⁸ <http://www.ideasinstitute.ie/about-us.html>, accessed 7 June 2015.

¹⁶⁹ Tutors have often graduated from the Peoples’ College and the National College of Ireland (NCI). Whilst the former is a trade union establishment, the latter was set up by the Jesuits in an attempt to counter the trade unions. The heads of unions would mostly stem from the NCI and were probably raised catholic at home. Through this avenue, tutors and union heads might, for example, have a certain view on the (in)appropriateness of women in employment and in trade unions (the first woman accepted in trade unions was Hilda Breslin. This was as an exception, though, because her father was a Larkin. James Larkin (1876-1947) was a leader in building the Irish labour movement. He founded the ITGWU in 1908, and, together with James Connolly, the Irish Labour Party in 1912.) Interestingly, up to the 1990s, the People’s College taught the Certificate in Trade Union Studies. Now, it is a matter of the NCI (O’Brien, 2015, interview).

¹⁷⁰ O’Brien (2015, interview) also had the idea to host a summer school for the youth years ago. This idea had never been taken up by SIPTU, though. Only last year, the summer camp in Carlingford was the first event of its kind, which brought together young activists from different unions on the island of Ireland. The event was jointly initiated by the Young Workers Network (YWN), Nevin Economic Research Institute and Trademark, and co-organised by Ethel Buckley, SIPTU National Campaigns and Equality Organiser (SIPTU Liberty, June 2014: 3).

Mandate takes a pedagogical approach which is “practical, progressive and democratic”. It seems constructivist, as “it builds on members’ own experience and knowledge” (Douglas, 2015). A participant in the senior representative course increased her understanding because “the tutors explained [...] topics in a down-to-earth fashion and showed how they can relate to us – the workers” (Gavin, 2015). Important for the union is developing participants’ ability to “think for themselves” in a critical-analytical way, because this is what they would need at work (Morrissey, 2015, interview). Gavin (2015) corresponds that, as a result of course participation, now she “question[s] things and [has] come to [her] own understanding”. Both expressions indicate a critical-emancipatory approach.

Whilst Mandate uses a lot of active learning methods, blended learning is only little. Many union members are not literate in IT. They would know how to use their smartphone, but they are not familiar with Microsoft Word and Excel. Currently, Mandate is “looking at setting up an e-learning course with IBOA (Irish Bank Officials' Association) and CWU (Communications Workers' Union)” (ibid).

TEEU describes their pedagogical approach with “presenting theories, blended with activity, for example role plays. Shop stewards want to know how to negotiate better”. In other words, shop stewards expect from training to gain knowledge and skills. What about attitudes? Heading (2015, interview) suggests that talking about inequalities is important. Shop stewards “need to know about issues and alternatives to neoliberalism, and austerity has been a good wake-up call”. Does this mean, conversely, that during Celtic Tiger times, TEEU representatives were rather dormant in thinking critically about the structural flaws in national as well as global capitalism and hence assumably not interested in emancipation from it? It remains to be seen whether shop stewards are interested now in exploring social inequalities and alternatives to capitalism, or if they just want to know how to function better within.

UNITE utilises active learning methods as well as online learning. “A lot is learning by doing” (Moctonian, 2015, interview). Moreover, in order to create a “first-class education service”, tutors have undergone political education to improve their historic understanding and their ability to criticise contemporary capitalism. Regular tutor briefings have been established.¹⁷¹

ICTU utilises blended learning very limitedly. An introductory module on Equality was developed through financial support from the Equality Authority (ICTU, 2013b). More important is to enable the learners in face-to-face sessions how the powerful media influences their perceptions and what the reality is (Nolan, 2015, interview).

¹⁷¹ UNITE the Union, *Minutes and Record of the Executive Council*, 17-20 September 2012 in London, <http://www.UNITEtheunion.org/uploaded/documents/EC%20Minutes%20December%20201211-8472.pdf>, accessed 14 June 2015.

As a result, except for Mandate's reference to progressivism, trade union education in Ireland seems not to commit officially to any philosophy of education, as portrayed in chapter 3. In practice, the educational approach appears a social constructivist base from which some tutors may tip into critical pedagogy.

9.3.3. Resources

Trade unions' educational activities are also the product of several resources. Like for the ETUI Education department, Irish trade unions' contribution to developing transnational competencies and action seems most of all a matter of *human, material* and *socio-organisational* resources.

9.3.3.1. Human Resources: Educational Staff

Due to reduced income, ICTU had almost halved union staff in Dublin and Belfast from 47 to 25 by the end of 2011 (ICTU, 2013b). As a result of insufficient resources, Congress does not have a European/International department (Vaughan, 2015, interview; Nolan, 2015, interview). Instead, transnational work is only one among many responsibilities that multi-skilled staff have (Nolan). Educational activities are delivered by more than 200 freelance tutors who collaborate with the Congress Centres' Network (CCN) (ICTU, 2013b).

IMPACT does neither have an education department, nor an education officer, let alone an international secretary. The Deputy General Secretary lacks human resource and is "dependent on staff to volunteer". Like in ICTU, education and training is additional to administrators' duties. The trainers are sourced from internal industrial staff who are 11 since July 2015. In order to drive labour education forward, a national secretary plus assistant who built up an entire education and training stream was needed. At the same time, internal resources appear wasted: "resources are not used efficiently in the union. We could probably do more for training if some re-organisation was done. But this probably required a new leadership" (Callinan, 2015, interview).

SIPTU has 314 trade union staff and around 9,000 activists (shop stewards, committee and EWC members, pension trustees, etc.) across the island (SIPTU, 2013). It is the only trade union in the Republic of Ireland which employs tutors. By 1980, the former ITGWU and Federated Workers' Union of Ireland (FWUI) had 7 full-time tutors (Croke & Devine, 2007). Until 2014, this number had decreased to 5 full-time and 2 part-time tutors. The two full-time tutors who retired last year have not been replaced for the reasons of money and the anticipated Workers' College. In addition to the tutors, SIPTU College is run by 2 administrators and the Head of College. All College staff are Irish who can speak only English. The amount of human resource seems sufficient, at the moment, because SIPTU College has difficulty in "getting the members". "Some officials are too busy" to push union members for training,

whilst other union members are not interested. Another problem is paid leave, as described earlier (O'Brien, 2015, interview).

Mandate (2012) had 45 staff in 2011.¹⁷² Two of them run the Organising and Training Centre (OTC), i.e. the National Coordinator of Training and Development and Personnel Manager, Aileen Morrissey, and her assistant, Margie O'Rourke. Both their capacities are fully exhausted which make expansion of the training programme very difficult. More staff appears not an option, though: "we try to be economical with resources" (Morrissey, 2015, interview).

The OTC works regularly with a group of 8 to 9 self-employed tutors. The tutors are mixed gender, but more women than men. Further 30 to 40 freelancers are available through the Trade Union Skillnet. Therefore, Mandate is "never short for tutors". Morrissey considers it positive to work with freelancers, because their collaboration with other trade unions facilitates exchange of ideas and practices. Importantly, tutors must be "people with a good heart" (Nolan, 2015, interview). They must have trade union knowledge and a labour-friendly perspective. Both needs to be proven by answering questions that come with every tender for tutoring (Morrissey, 2015, interview).

In comparison to DGB BW (see chapter 8), Mandate treats their tutors much more favourable. The union pays €400 per day for a basic course and up to around €1,000 for specialist topics, and it pays quickly. Moreover, the union involves tutors in course planning and meets with them four to five times per year (Nolan, 2015, interview).

UNITE employs 1,232 staff (UNITE, 2014) including one to two national trainers. The union collaborates additionally with a few hundred tutors (Moctonian, 2015, interview).

9.3.3.2. Material Resources: Finance and Educational Centres

Affiliation fees, government grants and participants' course contributions are the major sources of income for educational activities.

From 1989 to the peak in 2010, ICTU's income from affiliates had been constantly rising. The amount has almost quadrupled from €674.527 to €2.622.429. To the contrary, the share of affiliation fees which has been invested in courses has declined during the same period from 94.6% to 1.2%. The share has improved to 5.8% in 2012 (Figure 9.3-1). Nonetheless, the investment in courses had followed a positive trend until the maximum of €856,542 in 2008. Likewise favourable was the steady development of salaries and pensions for education and training staff, which had more than tripled from €524,125 in 1989 to the maximum of €1,852,874 in 2010 (Figure 9.3-2).

¹⁷² Membership numbers had fallen from 37,166 in 2009 (Mandate, 2010).

Participants must contribute to some ICTU courses whereas others are for free. In 2015, fees range between €50 for a basic IT course and €275 for Occupational First Aid. Between 1989 and 2008, income through participation fees had risen quite continuously by 160% from €653.859 to €1.045.306. In some years, the fees have more than covered course expenditures (+ 51.1% in 2005), whilst in other years the contributions were not enough (- 98.3% in 2012) (Figure 9.3-1).

Regarding Irish government, the confederation has received funds from the Department of Enterprise, Trade and Employment since 1993. Before, money was sent by the Department of Labour. The state had increased donations slightly from €890.088 in 1989 to €1.080.000 in 2004, but it was significantly more generous between 2005 and 2007. Since the peak of €1,827,260 in the latter year, support has been halved to €944,000 in 2012 (Figure 9.3-1). Furthermore, between 1993 and 2008, ICTU received from the Department of Jobs, Enterprise and Innovation an annual grant for Education, Training and Advisory Service (ETAS) (*ibid*).¹⁷³ Between 2003 and 2008, the Training and Employment Authority FÁS (2010) paid €2,482,024.73 through the Competency Development Programme (CDP).¹⁷⁴

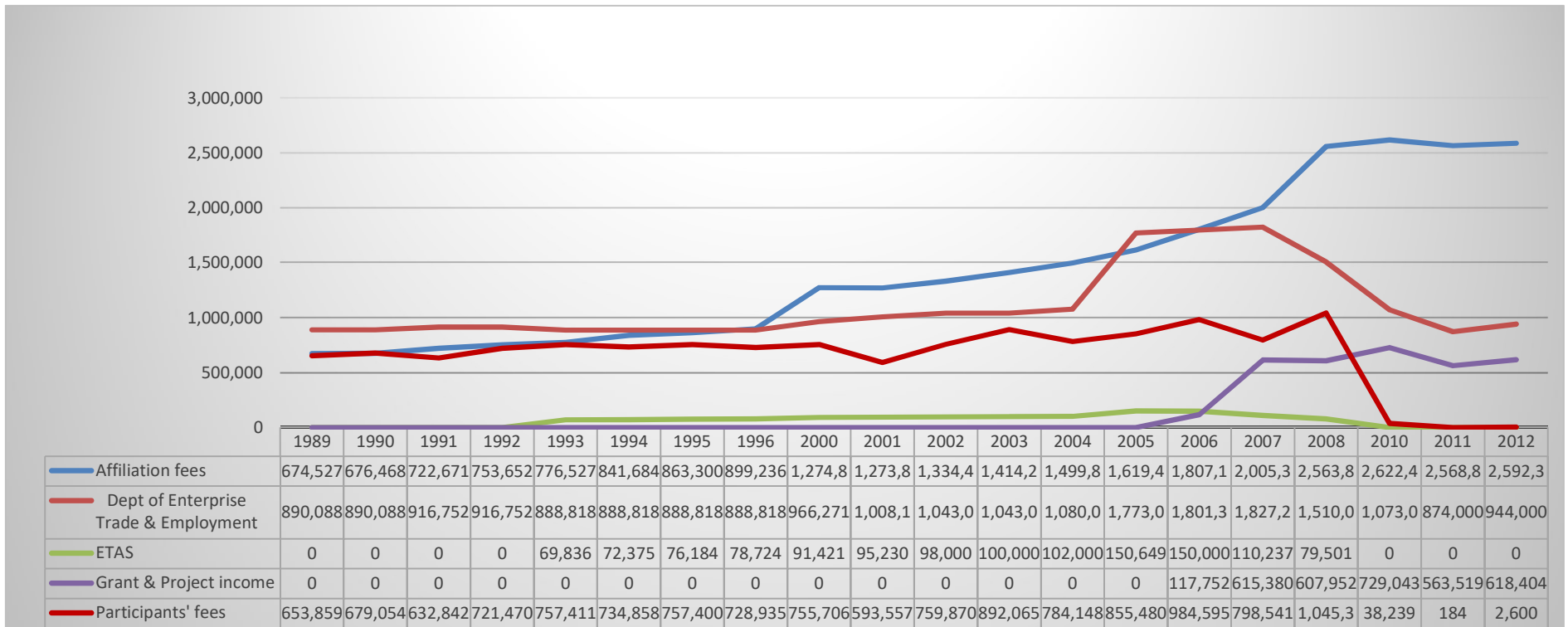
Since 2006, the confederation appears to increasingly look for other external money sources like grants and project income (Figure 9-1). The year 2008, when the economic crisis hit the island and social partnership came under review, seems like a turning point. Since then, Government has reduced steadily support from the Department of Enterprise where the amount in 2012 was just half the level of 2007 (*ibid*). ETAS was withdrawn probably also in 2009 when FÁS dissolved after an travel expenses scandal concerning the General Director, Rody Molloy, and other executives (Quinlan, 2009). Affiliation fees were increased with effect in January 2008, also as a result of cutbacks from statutory sources (ICTU, 2010). The demand for educational activities almost collapsed compared to previous levels, whilst the expenses for training staff have been cut notably (Figure 9-2).

For development education, ICTU is sponsored by the state agency Irish Aid to finance Global Solidarity work. In appeals, like regarding the Nepal earthquake in May 2015, the confederation asks affiliates, trade union members and the public to donate to the Global Solidarity Fund for selected projects. ICTU is thus also an agent of Irish government to meet the country's international development policies.

¹⁷³ Department of Jobs, Enterprise and Innovation, Correspondence 3.1, Meeting – 29/03/2012, [http://www.oireachtas.ie/parliament/media/committees/pac/correspondence/2012-meeting342903/\[PAC-R-393\]Correspondence-3.1.pdf](http://www.oireachtas.ie/parliament/media/committees/pac/correspondence/2012-meeting342903/[PAC-R-393]Correspondence-3.1.pdf), downloaded on 29 May 2015. "The ETAS supports a diverse range of courses including Health & Safety, Pensions, Activist development, conflict resolution and degree courses in Business Studies. The ETAS also involves the provision of all-year-round advisory services to [ICTU] affiliated trade unions. The grants paid by the Department to meet costs incurred by the ICTU in the operation of Education, Training and Advisory Services may cover up to 80% of expenditure on training and advisory services for union officials and activists. (Expenses include salaries costs of ICTU officials, administration expenses, SIPTU and ATGWU Training and Education Grant, Peoples College.) The grant is paid on foot of quarterly requests from ICTU" (p. 20).

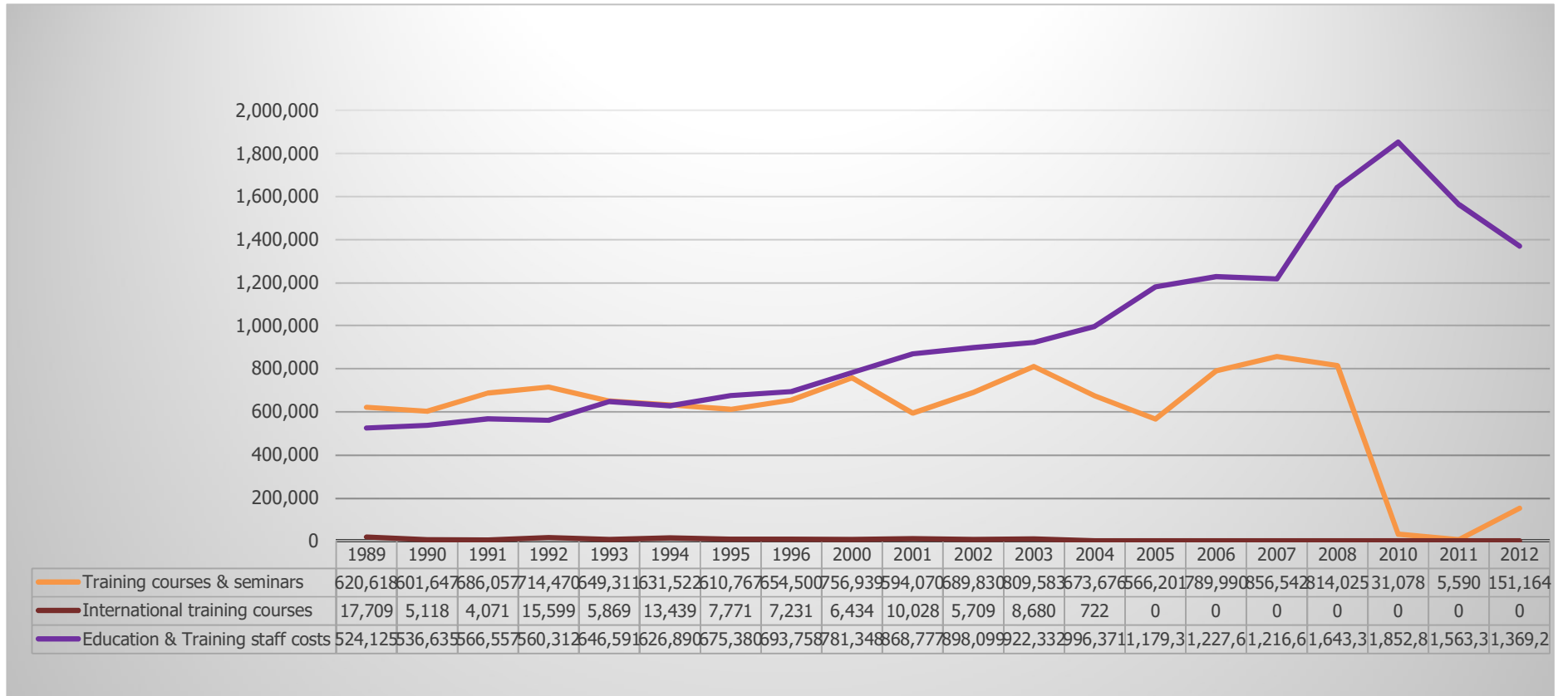
¹⁷⁴ €311,290 (2006), €832,670 (2007), €1,338,064.73 (2008).

Figure 9-1: **Snapshot in Selected ICTU Accounts 1989 - 2012 in €: INCOME**



Source: ICTU Report of the Executive Council 1991-93, 1993-95, 1995-97, 2000-2, 2003-5, 2005-7, 2007-9, 2010-13; own illustration. For the year 2009, no figures are stated. Irish Pounds (years 1989-1996) are converted into Euro by factor 1.26974.

Figure 9-2: **Snapshot in Selected ICTU Accounts 1989 - 2012 in €: EXPENDITURES on TRAINING**



Source: ICTU Report of the Executive Council 1991-93, 1993-95, 1995-97, 2000-2, 2003-5, 2005-7, 2007-9, 2010-13; own illustration. For the year 2009, no figures are stated. Irish Pounds (years 1989-1996) are converted into Euro by factor 1.26974.

IMPACT invests a fixed sum in development education. The union established in 1981 the Developing World Fund which is sourced by 3% of annual membership fees. Since then, the union has spent more than €5.5 million on projects in the developing world. Between 2009 and 2013, the Fund received from subscription income between €461,045 (2013) and €530,112 (2010) which indicates the continuous loss of membership since 2010 (IMPACT, 2013, 2015). Despite the decline in subscriptions, IMPACT had increased expenditures from €443,381 (2011) to €619,642 (2013). Due to overspending, the fund surplus has decreased to €68,289 in 2013 (IMPACT, 2015). In 2009, Public Services International (PSI) was the biggest beneficiary and received €280,000 for an international women and migration project as well as workers' issues in Africa, Latin America, Middle East, and Turkey (Hastings, 2010). Callinan (2015, interview) admits that the recent focus on charity rather than labour solidarity needs redirection. This would also increase their credibility in PSI again.

In contrast, there has not been any "fixed investment of membership fees in training so far" in terms of membership and staff training (ibid). In fact, the investment into training has been near to nothing between 2009 and 2013 (Table 9-2).

Table 9-2: **Membership Fees and Training Expenditures of IMPACT in €**

	2007	2008	2009	2010	2011	2012	2013
<i>Membership fees</i>	11.189.717	11.837.089	13.485.974	13.102.044	12.486.241	12.490.371	12.599.790
<i>Members' training</i>	-2.934	64.276	63.017	4.825	37.895	57.317	35.560
<i>Staff training</i>	25.719	33.993	22.520	12.325	29.902	22.048	28.783
<i>Total expenditures on training</i>	22.785	98.269	85.537	17.150	67.797	79.365	64.343
<i>in %</i>	0.2%	0.8%	0.6%	0.1%	0.5%	0.6%	0.5%

Source: IMPACT (2011, 2013, 2015); own illustration

IMPACT did not receive any government funding between 2009 and 2013 (IMPACT, 2013, 2015). Between 2003 and 2008, the union received €26,095.02 in 2004 and €10,800 in 2005 by FÁS (2010) through the Competency Development Programme (CDP).¹⁷⁵

SIPTU does not have a development fund, but has nonetheless supported several projects in developing countries which the union's Finance and Administration Committee has found eligible (Hastings, 2010). In 2005, the union donated €250,000 to the Tsunami Relief Fund (Irish Times, 2005). In 2008, €25,000 went into the Cuban Hurricane Relief Fund. Both funds are an initiative by ICTU Global Solidarity. SIPTU's process for development funding appears

¹⁷⁵ €311,290 (2006), €832,670 (2007), €1,338,064.73 (2008).

however quite arbitrary. The Finance and Administration Committee does not act according to set objectives and guidelines (Hastings, 2010).

All SIPTU courses are free for members. Roughly 90% of courses are financed through membership fees (O'Brien, 2015, interview). As visible in figure 9-3, membership fees have increased continuously from 1990 (€17,183,949) to the high in 2008 (€42,094,018). Almost mirror-invertedly did salaries and pensions for education staff as well as tuition fees for tutors rise. Also the investment in courses for members followed an upward trend, however, just until 2001. In that year, the maximum of 1.4% of members' fees was spent on educational activities for them. Thereafter, demand for courses obviously decreased during the recession subsequent to the dot.com-bubble (2001-2003). Investment respectively demand in courses rose again up to the next and ongoing crisis since 2008. The share of membership fees had decreased to 0.9%, though, and dropped further to 0.5% in 2011 and 2012 respectively. It follows that, since 2001, investment as well as demand for educational activities has generally been in decline.

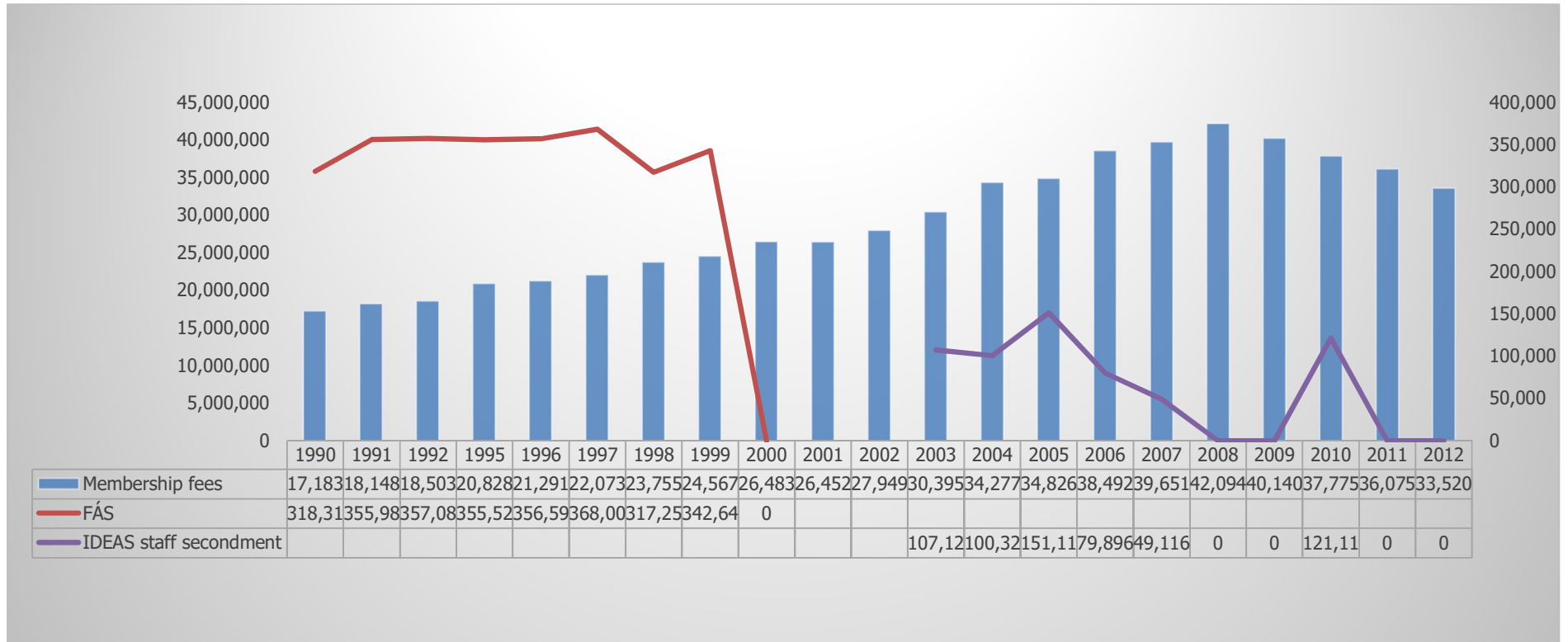
In addition to membership fees, a small amount of money is channelled through the Skillnet (O'Brien, 2015, interview). Between 2003 and 2008, the College received moreover €2,140,542.80 by FÁS (2010) through the Competency Development Programme (CDP).¹⁷⁶ Unlike for the years up to 2000, FÁS donations are not accounted for in the respective annual reports. Neither are Skillnet contributions made explicit. Such intransparency invites to assume that the money has not necessarily been used according to purpose. Has SIPTU received any other money from government which has officially not been mentioned?

Besides financing educational activities for members, SIPTU seems to consider staff development essential. Since 1995, staff has been allocated money for further development, which has risen from €1,554 to the peak of €239,164 in 2006 (Figure 9-4). Interestingly, contrary to union membership, the burst of the dot.com bubble appears to have invited the union to invest in staff upskilling. The current crisis seems too severe, though, for anti-cyclical spendings on staff development. Nonetheless, "staff development continues to be a central part of the training and up skilling" (SIPTU, 2013: 11).

Similar to grants for SIPTU staff, membership can be awarded education scholarships since 2000. It needed further investigation why these funds had diminished from €234,545 in 2000 to zero in 2008, although membership contributions had grown significantly during the same time (Figure 9-4).

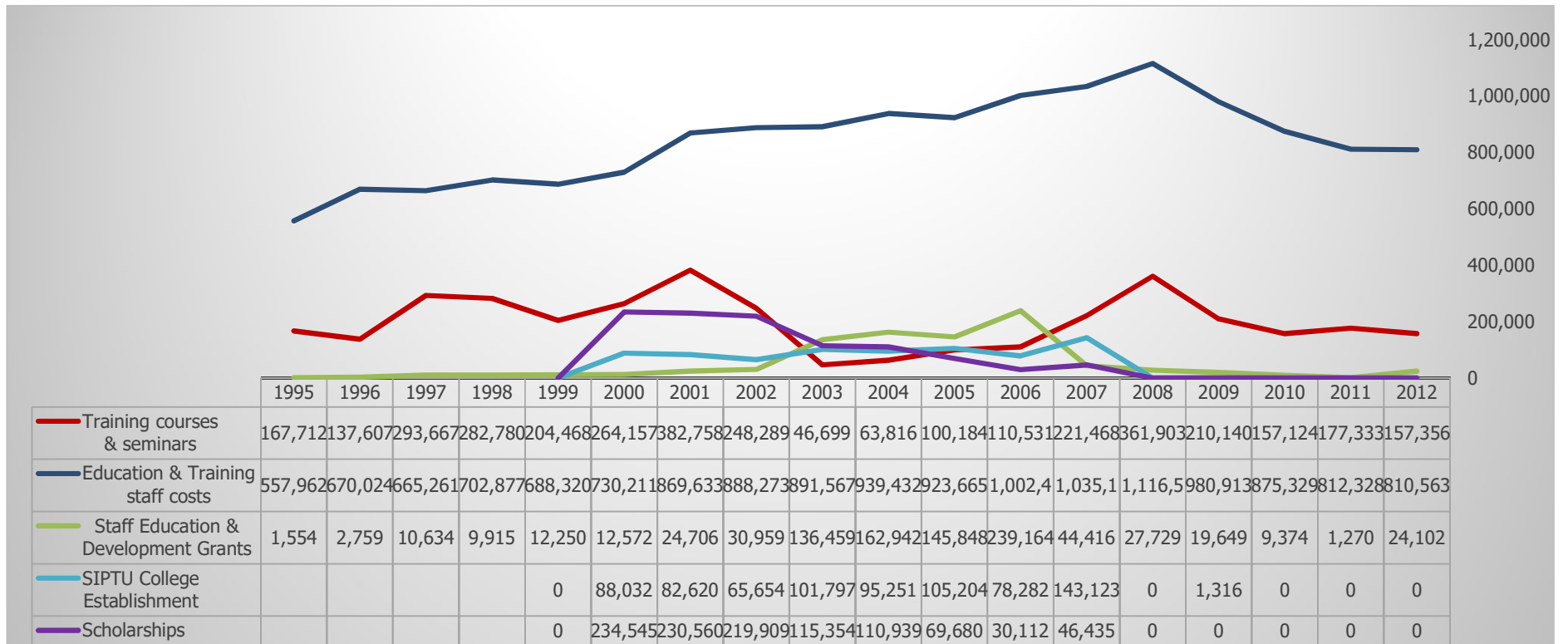
¹⁷⁶ €388,562 (2006), €889,336 (2007), €862,644.80 (2008).

Figure 9-3: Snapshot in Selected SIPTU Accounts 1990 - 2012 in €: INCOME



Source: SIPTU Annual Reports 1990, 1991, 1992, 1993/4, 1996, 1997, 1998, 1999, 2000, 2001, 2002, 2003, 2004, 2005, 2006, 2007/8, 2009/10, 2011/12; own illustration. Irish Pounds (years 1990-1999) are converted into Euro by factor 1.26974.

Figure 9-4: **Snapshot in Selected SIPTU Accounts 1990 - 2012 in €: EXPENDITURES on TRAINING**



Source: SIPTU Annual Reports 1990, 1991, 1992, 1993/4, 1996, 1997, 1998, 1999, 2000, 2001, 2002, 2003, 2004, 2005, 2006, 2007/8, 2009/10, 2011/12; own illustration. Irish Pounds (years 1990-1999) are converted into Euro by factor 1.26974.

Likewise, TEEU offers their courses free of charge to members, funded mainly through own resources. The Trade Union Skillnet provides rather small subsidy (Heading, 2015, interview). Funding from FÁS (2010) was neither substantial nor regular amounting to €250,035.11 between 2003 and 2008 through the Competency Development Programme (CDP).¹⁷⁷

“In a good year”, the union may invest between €50,000 and €60,000 in education and training annually. On average, it is probably half. The amount of investment “depends on the level of activity”, which is dependent “on demand” (Heading, 2015, interview). Given a membership of 39,000 and a weekly subscription of €5.20, the unions’ yearly income through membership is estimated at around €10.5 million. Similar to IMPACT, about 0.5% of this is spent on training. Participants may claim travel expenses equivalent to rail and bus tickets if courses take place elsewhere than in the home region. Outside their region, accommodation is provided (TEEU, 2015).

Mandated courses are free for members, too. These courses are financed through membership subscriptions as well as renting out training facilities to other trade unions and social movement groups (Morrissey, 2015, interview). For example, ICTU Global Solidarity Champions training take place in the Mandate training centre as well as the educational activities of Trademark Belfast, a social justice cooperative established in 2001 dedicated to tackling sectarianism and inequality (Mandate Training Centre Facebook page).

The Irish government has stopped its funding since the social partnership broke down (Morrissey, 2015, interview). Through the closure of FÁS (2010), another external source of financial support ceased, even if was rather little. Mandate received, in 2008, €233,475 through the Competency Development Programme (CDP), and, on average €38,912.50 per year between 2003 and 2008.

The General Secretary, John Douglas (2015: 2), suggests to his members that “Mandate continues to invest significant resources in [...] education and training”. Arguably, two staff managing the training centre is just the minimum. In 2013, the union invested €132,500 in education and training (Morrissey, 2015, interview). Considering a membership of 40,286 and a weekly subscription of €3.80, the unions’ yearly fee income is estimated at around €7.9 million. So, almost 1.7% of it was spent on training two years ago. Nominally, 1.7% is not significant. In comparison to IMPACT and TEEU, however, Mandate invests more than two thirds more in training.

Morrissey (2015, interview) never asks for an annual budget because she does not want to constrain herself. At the same time, she is not given one. Therefore, the Head of Training “keep[s] on pumping out”, and her demands have never been rejected so far. Given the

¹⁷⁷ €9,240 (2006), €240,795.11 (2008).

constraints in human resources, however, the amount is unlikely to increase much in the future.

In UNITE, “funding was heavily reduced last year, [and it] will be a key issue” (Moctonian, 2015, interview).

9.3.3.2.1. Educational Centres/Venues

The successor of the James Connolly Labour College (JCLC)¹⁷⁸ and the ITGWU’s Development Services Division (DSD), SIPTU opened its College in 1998 (Croke, 2007). The union rents the building which the National Cash Register Company used previously (Kelly, 2015, interview). The College is seen as “a key dynamo in the [union’s] Organising agenda” (O’Flynn, 2007: 3).

The premises appear, however, quite the opposite of dynamic. With the exception of the catering area, the colours of the building as well as the condition and interior of the bathroom and training facilities seem stuck in the 1960s/70s. In fact, educational activities may take place for up to around 50 people in two training rooms from which a smell of antiqueness emerges whilst the amount of daylight leaves a lot to be desired. The sofa in the entrance hall is spoilt with stains, pictures hang crookedly and some posters appear yellowed, as if they had been there for decades. The catering area feels fairly bright through a large window front towards South Circular Road, but is held in sterile white. The hot water dispenser is not as sterile and needs descaling. The College’s library is a small and rather disorganised room because the last professional librarian left SIPTU in the early 90s and has never been replaced due to financial resources (Kennedy, 12 June 2015). The staff offices, which also include IDEAS, appear in a similar light.

As opposed to German trade unions as well as Mandate and CWU, who own their educational centres and keep them in good shape, SIPTU does not keep their College up to date. Given this background, the expenditures on ‘SIPTU College Establishment’ between 2000 and 2009 remain highly unclear (Figure 9-2). What was €761,279 spent on? Evidently, it was not modernisation of the building. The condition notwithstanding, the College is QQI accredited.

¹⁷⁸ James Connolly (1868-1916) was a prominent leader and revolutionary in the Irish labour movement. He was member of the Irish Transport and General Workers' Union (ITGWU) and close to its founder, James Larkin. As a consequence of the emblematic Dublin Lockout (1913), Connolly established the voluntary Irish Citizen Army (ICA) to protect with weapons and combat skills the rights of workers and strikers. The maximal 250 people of the ICA marched also in the Easter Rising in 1916 to fight for a Republic of Ireland. After the unsuccessful attempt to break free from British dominance, Connolly was executed by the Brits as the ICA leader. The JCLC was open from 1919-1921 as a joint project of ITGWU and the Irish Socialist Party (ISP). The College fell prey to an organised raid by the British-originating Auxiliary Division in November 1920, which stole documents and damaged interior to an extent which the College was unable to recover from (Croke & Devine, 2007).

In addition, the College, SIPTU uses other unions' training centres, for instance, from CWU and Fair Hotels around the country.¹⁷⁹

In contrast to SIPTU's limited and industrial-like training space, UNITE owns a chateau-like country house in Esher, UK, which the Electrical, Electronic, Telecommunications and Plumbing Union (EETPU) has contributed to through the merger. A college since 1953 in the southwest of London, Esher Place is promoted as "the flagship training and conference venue for UNITE members" (UNITE, 2015). The EWC courses 'Organising & Bargaining in a Global Economy' and 'Black, Asian Ethnic Minority Leadership Development' take place here. The 'GLI International Summer School' is hosted by the Northern College for Residential and Adult Education, which was established 1978 in the middle of England. In 2013, UNITE invested £10 million (almost €14 million) in The View Hotel Eastbourne (Eastbourne Herald, 2013). Built in 1974 and also known as Eastbourne Centre, the four-star beachside venue is open to the public and for UNITE members at discounted rates.

However, UNITE also appears affected by financial instability. In 2014, the union considered selling Esher Place to Bank of China (Beckfor Thed, 2014).

Mandate built its own Organising and Training Centre (OTC) and opened it on 21 September 2009 in Dublin. Seminars are held in 3 rooms which have capacity for up to 30 people. The large, modern and comfortable kitchen area invites informal chats over tea, coffee and biscuits. In November 2008, the Centre was accredited by FETAC so as to allow Mandate the provision of certificates within the NQF (Morrissey, 2015). Thus, union members can progress in the national formal education system.

Most courses take place in the OTC. Around the country, Mandate chooses other trade union premises, if possible, such as those from the Congress Centres' Network (CCN). If no union facility is available, Fair Hotels are considered, like in SIPTU. If union members cannot come to the Training Centre, "you have to look at innovative ways". Some activities are, therefore, scheduled after work in locations close to the workplace (Morrissey, 2015, interview).

After 12 years of providing education and training to its members, TEEU created the Education, Training and Organisational Services (ETOS) in 2005. Located in the Dublin headquarters, ETOS is an FETAC approved non-profit organisation owned by the union. In March 2015, ETOS was approved by SOLAS as a training organisation for four kinds of training: the Construction

¹⁷⁹ Fair Hotels Ireland comprises 49 three to five star hotels around the island which "treat their staff fairly". The initiative was launched in 2010 and is endorsed by Irish and British trade unions, Irish social movement organisations, and others. www.fairhotels.ie.

Skills Certification Scheme (CSCS), the Quarry Skills Certification Scheme (QSCS) and Safe Pass (SP).¹⁸⁰

In 2015, ICTU courses took place in CWU, TEEU, Mandate, IMPACT and SIPTU branches and training centres as well as in facilities of the Congress Centres Network (CCN). Two full-time staff manage the CCN, which consists of 23 educational facilities throughout the island. That number has decreased from 27 in 2005 when the Network was established. In 2006, 19 facilities were FETAC accredited. Since the mid-1980s, the Centres' educational activities have been geared towards jobseekers' qualification needs. However, the facilities are also used for labour education (ICTU, 2008, 2013b).

As part of the wider movement restructuring, Congress has tried to increase coordination and produce common learning materials. The confederation also wants to build a "more professional structure" and create a "training ladder". Therefore, a national 'Workers' College' as the "centralised union college to coordinate all this" was proposed in 2011 (Vaughan, 2015, interview). The aim of the "all-island workers college" (ICTU, 2013b: 116) is "to share knowledge and information" (O'Brien, 2015, interview) and, therefore, reduce the duplication of resources which has resulted from Ireland's 'many small unions approach' (Nolan, 2015, interview). In so doing, the College is envisioned as "an efficient, cost-effective high quality education and training service to all Congress affiliated unions and to workers in wider society [...] with the focus on educating and building the capacity of union activists" (ICTU, 2013b: 115). It seems unsure, however, whether the Irish labour movement is mature enough for a national Workers' College: "the talk of the College is progressive, but it is too big a step from where trade unions are now" (Nolan, 2015, interview).

For building capacity, "course topics would be determined by reference to what knowledge and skills are necessary" (ibid: 116). Remarkably, ICTU considers attitudes (the heart inessential for capacity building. At the same time, they suggest 'Equality' and 'Solidarity and the developing world' as core topics, amongst others. Both topics require the heart, however, because injustice, empathy and compassion are central to them. The understanding of capacity building and the anticipated course offer appears, hence, contradictory.

The College was anticipated for 2016, but it seemed highly unlikely that this target would be met (O'Brien, 2015, interview). The current situation can be described as a "state of huge slugs" (Vaughan, 2015, interview) for several reasons. On the one hand, Irish trade unions are not used to working together, because decisions have been made through social partnerships at the national level. Collaboration has emerged only since this social partnership

¹⁸⁰ Internal document: Technical, Engineering and Electrical Union – *Education and Training, 2015*. Provided by Sean Heading.

had broken down, but trade unions are still reluctant to share their power. The fear of losing power through collaboration also appears a gender and education issue. Trade unions are still “male, pale and stale” without academic backgrounds. As a matter of competition, “nothing gets shared”. On the other hand, trade unions like Mandate and CWU have invested in own modern training centres and fear to lose their power for that reason (O’Brien, 2015, interview).

Callinan (2015, interview) suggested that the College would need seed funding to get going. But who will pay how much? Besides finance, the selection of staff and trainers as well as the standardisation of training materials might be an inter-union issue (ICTU, 2013b). Indeed, the post of Workers’ College Director has become an informal rivalry (O’Brien, 2015, interview). Another idea may cause discontent against the background of perceived power loss: namely, that ICTU affiliates provide basic and introductory training whereas advanced courses were centralised in the Workers’ College (ICTU, 2013b). This restructuring of education and training in Ireland could, however, be the first step towards a learning path from the local to the global level.

In addition to the educational centres of Mandate, CWU, SIPTU, TEEU-ETOS and the Congress Centres, the sixths and last QQI (FETAC) accredited centre belongs to the Finance Union IBOA (Nolan, 2015, interview).

9.3.3.3. Socio-organisational Resources: Partners, Networks and Networking Events

ICTU manages the Trade Union Skillnet (TUS) which ICTU, CWU, IBOA, Irish Nurses and Midwives Organisation (INMO), Mandate, SIPTU and TEEU established in 2012. The Skillnet is funded by the Department of Education and Skills and employers with the purpose for “up-skilling, cross-skilling and re-skilling” people for companies’ and industries’ needs. Moreover, labour representatives are equipped with negotiation and change management skills, whilst women are supported in taking leadership roles in the firm. Thus, trade unions help companies to increase their competitive and innovative power (TUS, 2014). In other words, the TUS provides training for both employed and unemployed members to improve their self-economisation, employability and compliance with the Irish capitalist system.

At the same time, due to individual resource shortages, it is important for trade unions to share their resources. Through the Skillnet as well as ICTU’s training programme, courses regarding special subjects which are “outside the norm” and which a single union would have not managed otherwise can be filled. Special subjects include Project Management, Training and Development, Mentoring, Whistleblowing, Media and Organising (Morrissey, 2015, interview).

Congress is also the centralised access point to the ETUI. ICTU Head of Learning, Frank Vaughan, is an “active and present” member of the ETUI Pedagogical Committee and participates in ETUI’s activities (Garrido, 2015, email). He is supposed to forward course announcements to potential participants and nominate candidates for ETUI courses. Between 2010 and 2012, the Head of Learning sent affiliated members to “courses which included EU Decision-Making, Project Management, Trade Union Renewal, Lifelong Learning, Health and Safety at Work and Leadership for Women” (ICTU, 2013: 115). Due to the increased perceived need for project management, Vaughan nominated members for the train the trainer course. Of 3 levels, a group of four is now able to deliver stage 1 and 2 courses in Ireland. The group consists of Sean Heading (TEEU), Sylvester Cronin (SIPTU), Marian Geoghegan (IBOA) and a colleague from the Public Services Executives Union (PSEU) (Heading, 2015, interview).

Congress also hosts seminars jointly with ETUI. As part of the Informia Project, ICTU invited two researchers, Romuald Jagodziński and Kevin P. O’Kelly, and the Education Officer, Marika Varga, for the morning of 4 November 2011 to provide insights on the EWC recast directive and training needs.¹⁸¹ ‘Perspectives on worker involvement in Ireland’ were discussed for a full day in the CWU Conference Centre on 28 February 2013. This seminar was financed by the ETUI.¹⁸²

The ETUI Education director confirms that “every year we have common activities with [ICTU] as partners - host or not. We also use some of their trainers on activities”. In general, Garrido (2015, email) describes the relation to ICTU as “good” and the collaboration as “normal, nothing special with Ireland”. In other words, ICTU participates in joint activities, but it does not push further collaboration with the ETUI, as the DGB BW has been doing recently (see chapter 8).

Apparently, ICTU affiliates appreciate this single bridge to Brussels as a matter of resources. “The day-to-day stuff takes over. I am busy enough doing my own work”, Morrissey explains, describing her favour for Ireland’s centralised collaboration with the ETUI. However, she seems not to follow blindly the rule which Garrido firmly refers to as to why he is not allowed to collaborate with the national confederations’ affiliates directly (the ETUI only works together with the confederations). “Nothing stops us from getting in contact with the ETUI. I have also my own contacts”, Morrissey reveals. Likewise, O’Brien (2015, interview) has been in contact with ETUI trainer Valerica Dumitrescu in regards to a joint activity and is likely to contact her directly in the future.

¹⁸¹ ICTU (2011) European Works Councils and Trade Unions, <http://www.ictu.ie/unionlearning/events/2011/11/>, accessed 1 June 2015.

¹⁸² ICTU (2013) Perspectives on worker involvement in Ireland, <http://www.betterway.ie/press/diary/2013/02/28/>, accessed 1 June 2015.

Seemingly, Garrido is not allowed to contact the confederations' affiliates due to elite arrangements, whereas proactive affiliates would allow themselves to take what they need, if elite arrangements are perceived as insufficient. This break-out from (in)official rules questions the usefulness of ETUI collaboration being strictly limited to national confederations. Conversely, "ETUI cannot sort it, if the nationals have not sorted it" (O'Brien, 2015, interview).

Due to a previous shortage in affiliation fees, ICTU re-affiliated to the International Trade Union Confederation (ITUC) in 2008 (ICTU, 2010). In 2009, ICTU applied successfully through Léargas for EU funding for a Leonardo Mobility Project. As a result, 15 coordinators and trainers from the Congress Centres Network visited ProAros for 5 days in Västerås, Sweden, in order to learn more about the Swedish way of handling unemployment and vocational education and training (ICTU, 2010, 2013a). ICTU also joined, recently, the Management Board of the Workers' Educational Association (WEA) and continues relations with the Open University (ICTU, 2013b).

Because of affiliation to a number of European and international bodies, "we would like to think we are good internationalists", the IMPACT Deputy General Secretary describes. The union is affiliated to EPSU, Eurocadres, IIEA (Institute of International and European Affairs), ETF, ITF, PSI, Justice for Colombia (Ireland) and Amnesty International. Cross-border affiliation does not necessarily result in cross-border thinking, feeling and action, though. Callinan (2015, interview) seems well aware of this. He actively participates in EPSU and is friendly with the British UNISON, "but this is just on senior level". He did not refer to any other body of the above list of transborder affiliations. In other words, transnational work does not filter down to the grassroots and most affiliations have a primarily marketing effect. "We could do an awful lot more of projects" (ibid). However, IMPACT lacks human resources the administration level to acquire funding and manage such projects (ibid).

Besides relations to EPSU and UNISON, IMPACT has not engaged in transnational concerns for more than a decade. The last project with Finnish trade unions was 12 to 14 years ago and "very much on head office level". "It was no conscious decision to stay away from international things", Callinan (2015, interview) explains. The crisis would have prevented the union from investigating opportunities for EU projects. Moreover, wishing it forgotten, he refers to a scandal in 2010 involving IMPACT, SIPTU and ICTU officials about the misuse of money for 31 international excursions and other expenses.¹⁸³ The scandal was used by employers and the media to damage the unions' image (ibid).

¹⁸³ The case considers an undisclosed bank account controlled by a number of SIPTU officials in which several state agencies had paid into for nearly a decade. Instead of using the €4 million plus for upskilling health workers, investing in environmental issues, etc., some SIPTU and IMPACT officials enjoyed themselves around the world in 31 'study trips' and 'social partnership meetings' (sometimes with their partners), together with high profile state

As a consequence of this case and the (inevitable) absence of visible results, it is “hard to defend international work as valuable”. From his own experience with his staff, travel is “great bonding and learning” and important for confidence building – and especially trade union officials needed more confidence. However, Callinan here again highlights his lack of human resources and adds that finance has prevented him from pushing outcomes of international study trips any further (ibid).

In other words, IMPACT’s cross-border engagements have not yielded any visible successes for the members, on the one hand, because the benefits were exploited by senior level. On the other hand, benefits have remained with individual union staff, as administrators have been missing to expand them to both the staff and the grassroots level.

What might help overcome IMPACT’s human resource issue is collaboration with the ETUI. Callinan has not, however, looked into collaboration with Brussels yet. He does not have any personal connection to Garrido. At the same time, Garrido cannot make personal contact due to labour internal institutions which prohibit dispersing the trade union education network among Europe: the gatekeepers to the ETUI are the national confederations.

SIPTU is affiliated with the international level through IUF (International Union of Food and Allied Workers' Associations), IMF (International Metalworkers' Federation), BWI (Building and Wood Workers' International) and UNI Global Union. In Europe, the union is connected to the ETUC through Congress as well as several industry federations.

Transnational partnerships regarding education and training rest in projects only (O'Brien, 2015, interview). For example, the union has sent, in collaboration with the Cuban Ambassador to Ireland and the Cuban Trade Union Confederation (CTC), 35 people to visit Cuba for 6 days in November 2009. Spanning from the grass-roots to the union executive level, the SIPTU Cuba Solidarity Forum met with the National Union of Education, Culture and Sports Workers (SNTECD), Maternity Hospital Obrera, Medical Centre Benjamin Moreno, International Affairs Department of the Cuban Communist Party, CTC, Cuban Department of External Affairs and Cuban’s Women Federation. The Forum gave recommendations for trade union and government action to promote further active collaboration and support (SIPTU, 2009).

IDEAS has developed links with trade unions in Europe since the mid-1980s. The very first project included IG Metall and Swedish Metal and was about a social partnership at the enterprise level. One result of the 4-year project were four 30-minute TV programmes on RTE called ‘MYOB - Mind Your Own Business’, which reached 0.5 million viewers. The series was introduced with the support of the former Irish Prime Minister Bertie Ahern. Currently, the

officials (KPSWA, 2010). SIPTU leadership insisted that they had never known this account. Therefore, it was neither approved nor in control of the union (Irish Times, 2010).

Institute works with Verdi on “helping people to see their competencies”. At the European level, IDEAS collaborates with the ETUC, EFFAT and industriAll. All projects are pilot studies financed by the European Commission from which the participating countries develop educational activities. Through Vaughan, IDEAS may collaborate with ETUI, UNI Europa, ILO and Global Labour University (GLU) (Kelly, 2015, interview).

The Institute does not work together with any consultancy. Rather, Kelly perceives the big consultancies like KPMG, Deloitte, etc. as competitors, since they provide service to companies. He does not know about EWC training, but he would not be surprised if they offered some (ibid).

UNITE is linked to Keele University, UK. Eighty officers, staff and activists applied for 20 places available to gain a 1-year blended learning experience in ‘Certificate in Union Leadership and Industrial Relations’. The Certificate is in its second year and includes a module on globalisation. Graduates with good grades may proceed to a Master's degree (Moctonian, 2015, interview). The university offers, for example, blended learning Postgraduate Diplomas and Master's in Industrial Relations, where one stream specialises in ‘European Industrial Relations & HRM’. Another blended learning ‘Part-Time Certificate in Industrial Relations’ is available, for which the TUC grants bursaries.

In 2008, UNITE merged with the North-American United Steelworkers (USW) to found, in November 2011, a new transatlantic trade union named ‘Workers Uniting’. Three million members in Canada, US, Ireland and UK are offered an annual leadership course and regular exchanges.

In 2013, the union developed, in collaboration with the British confederation TUC and IG Metall, a document called ‘German Lessons’ “which promotes educational and vocational training of young people”.¹⁸⁴

In 2014, UNITE started global collaboration with the ITF and IndustriALL regarding the ‘Industrial Hub Programme’. The purpose is to bring together trade unionists from different countries and industries, yet along the same supply chain, with the aim to break official trade union structures and go beyond national and sectoral divisions (Moctonian, 2015, interview). The first 3-day workshop, in November 2014, took on HumberPort, “the UK's No. 1 port network - at the heart of Britain's international trade”, as they promoted themselves online. For UNITE Regional Officer Bev Clarkson, this programme might be a “game changer” (quoted in ITF, 2014).

¹⁸⁴ MINUTES OF THE EEE NISC HELD AT ESHER PLACE ON WEDNESDAY 3 JULY 2013, p. 3, <http://www.UNITEtheunion.org/uploaded/documents/EE%26ENISCminutesJuly2013NISC11-18100.pdf>, accessed 14 June 2015.

Seemingly, the workshop has offered a space for informal cross-industry networking that may lead participants to stay in contact and communication. Diana Holland, UNITE Assistant General Secretary for Transport, Food and Agriculture, believes this to be key for concerted solutions to transnational labour issues. Moreover, participants built their confidence and reduced the feeling of isolation. As a result, they dared to “start looking outwards, instead of only looking inwards” (Diana Holland quoted in Blagg, 2014). The future idea is to expand the Industrial Hub Programme to other seaports and, possibly, airports (ibid).

Mandate (2012) is affiliated with transnational social and labour movements: Amnesty International, Clean Clothes Campaign, International Centre for Trade Union Rights, Justice for Colombia, Trade Union Friends of Palestine (TUF), UNI Europa and UNI Global. The union also collaborates closely with the British TUC (Morrissey, 2015, interview).

Aileen Morrissey (Mandate), Carol Scheffer (CWU) and Marian Geoghegan (IBOA) work together to promote equality and diversity. Scheffer is also member of the UNI Europa Women’s Committee 2012-15. The ladies compiled a brochure called *Mainstreaming Equality: Equality Handbook For Trade Union Representatives*, which can be used by all trade unions. The brochure can also be downloaded as an app so that representatives can access this information wherever they are, such as in a meeting. As part of the Equality Mainstreaming Unit, the project is financed by the European Social Fund 2007-2013 and the Equality Authority (Morrissey, 2015, interview). Interestingly, a group of three women engage in equality, which is an ongoing female issue all over the world.

For staff training, Morrissey recommends the ETUI and Verdi. She met the Verdi GPB Executive Director at the ETUI workshop ‘Labour and Union Adult Education - experiences, current practices, objectives, self-concepts’ in Berlin in February 2015 (ibid).

The General Secretary Eamon Devoy illustrated in TEEU (2012) that the union “has built-up international links with many European, American, Canadian and Australian Unions and the Australian Electrical Trade Union (ETU) has become a particularly good friend”. However, TEEU is neither affiliated with the ETUC nor with any ETUF. Heading (2015, interview) explains the decision to avoid the European level with the limitation in resources and cautious consideration where money is invested. Apparently, the union expects more ‘return on investment’ from activity at the international level. Might another reason be that Irish technical workers and engineers often take jobs in Australia, Canada and the US, where the English-speaking labour markets are much bigger than in Europe?

The Power Union joined IndustriALL Global Union in 2013, one year after the latter’s establishment, and has participated in two conferences to date. They also associated with the

newly-founded Global Power Trade Union, which held its first congress in Dublin in September 2013, bringing together representatives from 35 union organisations worldwide. Since then, the global union has successfully campaigned in Australia and Greece, for example, and analysed the sector in view of technology (Devoy, 2015).

Through the Irish Ambassador to the United States, Devoy (2015) was connected to Bill Hite, General President of the United Association of Plumbers, Pipefitters, Steam Fitters, Sprinkler Fitters, Service Technicians and Apprentices from the US, Canada and Australia (UA) in September 2014. Four months later, both unions signed a Federation Agreement. Devoy comments that,

"the UA and TEEU Federation brings an entirely new international perspective to the work of both of our unions. [...] This includes global organising of workers to ensure that proper employment standards are developed and maintained. It also includes the imperative that engineering workers are suitably trained and re-trained to meet the changing technologies crucial to the needs of successful business"(United Association, 2015).

Devoy appears, hence, to consider the purpose of TEEU education to be improving the employability of his members, but not their further emancipation. A UA delegation visited TEEU in June this year in order to talk about advanced skill training, for instance in welding (Heading, 2015, interview).

Heading (2015, interview) promotes the ETUI programme if courses are "relevant" to the union: "not every course is good", though. He depicts the added value of ETUI seminars in "meeting other people from similar backgrounds", but he agrees that meetings with people from different backgrounds are valuable, too. He once met with police representatives in Bulgaria and gained knowledge and understanding from their way of negotiating on health and safety. Similarly, Brian Nolan, TEEU National Construction Official, realised the practices in Ireland from his attendance at an ILO seminar in Turin on 'Organising practices in Eastern Europe' and that the colleagues in the East "are 40 years behind" (2015, personal conversation). Contact details were exchanged and some common activities developed. Most Eastern Europeans had some English or at least one person who could translate (ibid).

However, collaboration between TEEU, ETUI and ILO is managed mainly by Congress. TEEU does not have enough resources to establish these cross-border relations because they are "just a small union" (Heading, 2015, interview). "It makes more sense" that ICTU is in charge (ibid). The 'small union' seems to have enough resources to establish relations with IndustriALL, UA, ETU and others, though. The matter appears dependent, therefore, not on the size of resources but, rather, on how the money is spent. TEEU does not have formal links to any university (ibid).

Depending on their political direction, trade unions tend to have different cultures and, hence, approaches to enforcing their collective agreements. In Irish construction, the culture seems to be “rough and ready” whilst other unions on the island were “not too aggressive”. Ultimately, however, labour shares a “similar ethos and values like fairness, solidarity” (ibid). Like IDEAS, Heading obviously assumes that labour attitudes are a given.

9.3.3.3.1. Intra-union Partnership: SIPTU College and IDEAS

The Institute for the Development of Employees Advancement Services (IDEAS) was established in 2001 in response to a strategic demand put forward by members: “its task is to identify ways in which new thinking and new services can be introduced into the workplace for the benefit of employees and the enterprise as a whole”.¹⁸⁵ If this self-presentation is true, SIPTU members are asked to be trained to think for the benefit of the company and expects that employers will share the benefits with their staff. In addition, employees may transfer some skills (e.g., teamwork) to other roles in the corporate, labour and private worlds to grow in companies, trade unions and families (Kelly, 2015, interview).

We may notice the attempt to view the enterprise holistically. For IDEAS, adding to the corporate view the perspective and experience of labour would encourage a holistic view of the enterprise (ibid). While it certainly is a more inclusive view of the company if labour’s perspective is included, the purpose of including workers and their representatives remains in favour of the company, to make it more competitive and profitable through innovations and cost savings. “Employers want innovatively thinking people, a self-directed and flexible workforce, workforce to work with. Autocratically managed companies will die” (ibid). Besides improvement of competitiveness, an empowered workforce makes middle management redundant (ibid). In other words, IDEAS empowers workers to work in corporate interests.¹⁸⁶

Thus, the Institute’s course range covers basic IT skills, train the trainer, coaching and mentoring, teamworking, health and safety, union learner representatives, effective meetings, entrepreneurship, customer sales and service. Personal development is understood in terms of becoming more effective at the workplace, mastering job competition and finding alternative employment in case of redundancy through skills development in CV preparation and job interviews, and problem solving.

SIPTU General Secretary, Joe O’Flynn, chairs the Institute. Ron Kelly, who has been with SIPTU for more than 40 years and was a tutor for some time, manages two male colleagues and a female administrator. They work together with a group of up to 20 freelance trainers

¹⁸⁵ <http://www.ideasinstitute.ie/>, accessed 5 June 2015.

¹⁸⁶ IDEAS trains Joint Management Steering Groups which consist of representatives from both management and unions. For example, they would do together a FETAC accredited course in team-working. The Institute also trains operational teams, for example, at a machine, in a department, in order to develop the people towards becoming a “natural team” (Kelly, 2015, interview).

who must all have a background in trade union training, and they are “always seeking for more” (Kelly, 2015, interview).

How the Institute is financed appears not so clear, though: “if you knew, I had to kill you”, Kelly replied jokingly to the author (ibid). Since there is truth in every joke, this extreme comment may indicate dubious agreement between the actors involved, which are the government, SIPTU, EU and employers. IDEAS tries to increase the money constantly (ibid). Recalling the corruption scandal in Ireland involving SIPTU and IMPACT officials, as well as the corruption scandal involving trade unions in Spain (see chapter 4), both of which involved money for labour education, in addition to the corruption scandal at Volkswagen in Germany (see chapter 2). A corruptive arrangement cannot be excluded.

Although both organisations belong to SIPTU, the relationship between the College and IDEAS seems disconnected. “Communication has never been good” between SIPTU College and IDEAS (O’Brien, 2015, interview). In fact, Kelly (2015, interview) did not know that the College does not have an official programme anymore and that the policy has changed towards scheduling courses on demand together with the sectors. He was also wrong in assuming that the College would offer blended learning.

What may have led to the silence between the College and the Institute? Kelly explains it through the differences in their purposes. Whilst SIPTU College is supposed to train shop stewards and other representatives, IDEAS’ mission is to “look for European trade union partners and themes to develop processes” (ibid). By ‘processes’, they mean educational and funding processes which are developed through joint project applications to European institutions. Their latest project aims at developing new educational activities for EWC members (see later section).

9.3.3.4. Moral Resources: Educational Leave

A huge challenge for participation is the absence of legislation on paid educational leave (Nolan, 2015, interview). “The demand [in education] is high, but access and time off are problems” (Vaughan, 2015, interview), particularly in the private sector (Nolan, 2015, interview). The increase in demand seems a result of the unions’ shift from servicing to organising and the members’ greater awareness and perceived need for education and training. Thus, the number of courses has grown in Mandate from 4 to 5 during servicing times and is up to between 15 to 20 now (ibid). The question, however, is how many courses offered really take place. Of the 20 SIPTU courses that were scheduled in Services last year, 6 were cancelled because the respective Industrial Officer was unable to negotiate release for applicants (O’Brien, 2015, interview).

Usually, employees must negotiate educational leave for labour educational activities “on a course by course basis” (Vaughan, 2015, interview). For TEEU, such negotiations had been easier during boom times and are much harder now, in recession, as staff numbers have reduced. As a bargaining chip, the union puts forward to the company that a well-trained workforce is a win-win for both employer and employee (Heading, 2015, interview). As mentioned earlier, SIPTU has to negotiate time off for its members.

In order to avoid employers’ voluntarism, some unions have a relevant clause in their collective agreements (Vaughan, 2015, interview). Indeed, Mandate has agreed with large retailers like Primark, Tesco, Marks & Spencer, Arnotts, SuperValue and Debenhams to paid educational leave for 3 to 5 days per year. Unlike in the public sector before the social partnership collapsed, it has always been difficult for Mandate members to get paid time off for training. Therefore, this issue “has always been on the [union’s] negotiation agenda”.¹⁸⁷ To what extent there was and is a flexibility in training in the public services would require further investigation.

Generally, Irish trade unions seem, however, not too pushed to fight for an educational leave statute: it is “no major priority”, Vaughan maintains. TEEU argues that they would be in favour of national legislation on paid educational leave, but that “it is not a key priority during austerity” (Heading, 2015, interview). Other unions perceive that paid educational leave has never been a key priority in the movement. The fact that trade unions in Ireland have never pushed for ratification of ILO Convention 140 or tried to achieve national legislation on paid educational leave has always been “a big problem” for Mandate (Morrissey, 2015, interview). Nolan (2015, interview) explains that ratification was on the trade unions’ agenda in the 1980s/90s, but that it never came through due to employer resistance. Thus, “paid educational leave was a missed opportunity” (Kelly, 2015, interview).

However, membership not appear to demand the creation of a new opportunity: as a result of the crisis, “people have kept their heads down” (Vaughan, 2015, interview). It follows that, even if workers in Ireland had the right to paid educational leave, it was questionable if they would have really taken it, at least during the crisis, due to fear of job loss.

¹⁸⁷ Mandate negotiators seem quite skilled. During the past 8 years, Mandate had been able to achieve better results than what trade unions had achieved through social partnership.

9.3.4. People

9.3.4.1. Individual Commitment to Cross-border Collaboration and Trade Union Education

Morrissey's assistant agrees that it always depends on the person in charge of education and training whether the area is pushed forward or not. She describes the Mandate Head of Training as engaged, resourceful, multitasking and always trying to push boundaries (O'Rourke, 2015, personal conversation). Morrissey is an active member in the ICTU Executive meetings (also O'Brien, 2015, interview) and supports collaboration with the ETUI. As mentioned earlier, she has teamed up with CWU and IBOA in regards to equality and diversity training. She has established her own contacts in the ETUI despite the ICTU's centralised position. Also, the fact that she has attended ETUI seminars proves her determination and pro-activity. In July 2014, Morrissey travelled to Colombia for a week as part of the 'Justice for Colombia' delegation.¹⁸⁸ Moreover, she appears compassionate to the vulnerable workers who Mandate represents and frequently goes extra and creative miles for developing her members' strength and resistance. Nolan (2015, interview) finds Morrissey "very innovative".

Callinan (2015, interview), to the contrary, has neither made contact with the ETUI nor made himself familiar with the ETUI training programme. Whilst he quite regularly attends EPSU meetings, he has not participated in the PSEU Board meeting since 6 years (ibid). On a positive note, he has, however, established from scratch the two-level workplace representative course within his four years of office. He has also increased the number of organisers to 11 in an effort to recruit new members. It remains to be seen whether his organisers will be successful and how many new subscriptions are then invested into education and training.

The CWU Head of Education, Carol Scheffer, is illustrated as very proactive too, not only regarding collaboration with European Federation but also regarding education for union members. She observes the quality of educational activities through chairing the CWU education committee (Vaughan, 2015, interview).

Mandate National Coordinator, Brian Forbes, "has developed close links with [their] European sister unions Unionen and Handels [in Sweden] who deal with IKEA". He also works together with the global union UNI Commerce and the British USDAW for organising H&M (Mandate, 2010: 44). He, moreover, represented the trade union at conferences in Lisbon and Paris in 2011 and called for increased transnational labour collaboration regarding austerity in Europe (Mandate, 2012).

¹⁸⁸ Justice for Colombia delegation 2014: Final statement, 5 August 2010, <http://www.justiceforcolombia.org/news/article/1671/justice-for-colombia-delegation-2014-final-statement>, accessed on 29 May 2015.

SIPTU's engagement in EWC training "was largely driven by one person. He moved on". (Vaughan, 2015, interview). The person in question is Martin Naughton (Kelly, 2015, interview) who retired in June 2012. He "was an expert" in EWC training (Kennedy, 2015, personal conversation), but he was not replaced in this function.

SIPTU tutor Mags O'Brien (2015, interview) is the only ICTU Global Solidarity Champion of the union. She is currently Chair of Trade Union Friends of Palestine (TUFFP) and visited Palestine in 2007 together with an ICTU delegation. She was also on the Irish vessel as part of the Freedom Flotilla Movement which captivated Israel at the end of June 2014. Although she was among those who were held in prison for the peaceful attempt to help free Gaza, she would always return. O'Brien is an example to prove that "a tutors' personal characteristics and professional competence are critical success factors" (ICTU, 2013: 116).

In addition to the commitment of those responsible for offering an education and training programme, workers' commitment to attending activities seems vital. Among SIPTU participants are people who attend evening classes (6-9pm) before they head off to night shift. Another union member drives 115 km every Monday evening from Cavan to SIPTU College (O'Brien, 2015, interview).

9.3.4.2. Participants

9.3.4.2.1. Selection of Participants

"Approximately 2,000 activists and workplace representatives attend education and training events each year, which are organised by their trade union" (ICTU, 2013: 113). This numbers around 2.6% of total ICTU membership. In 2012, 1,824 employees and 235 jobseekers took part in 20 activities through the Trade Union Skillnet (TUS) (ibid). Non-unionised labour representatives are assumed not to attend trade unions' courses, but they may not be accepted either (Kennedy, 2015, personal conversation).

There are, ideally, 12 to 15 people in SIPTU classes, but these numbers can go up to around 23. Usually, one tutor is in charge. The courses are for union members only (since the purpose of the college is to develop activists). Why would non-union members be interested in a health and safety course and other trade union knowledge (O'Brien, 2015, interview)?

Similarly, on average, 15 participants are in Mandate classes (Morrissey, 2015, interview; also Moctonian, 2015, interview, regarding UNITE). "Membership are [mostly] younger women who want to speak out". Trade union organisers watch closely for who is elected as a lay activist (shop steward) and suggest appropriate training. The courses for staff are "very on demand, and they want more" (Morrissey, 2015, interview).

In TEEU, the members must take initiative and write to Sean Heading if they want to attend a course. Once at least 8 people have confirmed their attendance and received approval for paid leave, the educational activity goes ahead (TEEU, 2015).

The reason why trade union education has, so far, had limited impact on improving transnational labour collaboration is not so much a matter of skills but on the selection of participants, O'Brien (2015, interview) argues. Putting General Secretaries and activists together would not lead to optimal learning results because their respective experiences differ too much. Usually, the secretaries have advanced knowledge, whereas activists' knowledge is rather basic. The difference in knowledge background also applies to multinational participants. Some may not be familiar with fundamentals, like the different IR systems.¹⁸⁹ Thus, the course aims of cross-border educational activities "look great", but the mismatch of participants may result in the individual perception that nothing can really be gained (ibid). This frustration can prevent people from attending future seminars (ibid).¹⁹⁰

Moreover, "language is always a problem" (O'Brien, 2015, interview; also Kelly, 2015, interview; Nolan, 2015, interview). The language barrier "stops social interaction despite translation" (Nolan, 2015, interview).

Regarding nominations for ETUI seminars, in O'Brien's (2015, interview) eyes, "anyone would be eligible". The ICTU Head of Learning forwards notifications to the unions' General Secretaries who are, in turn, responsible for sending the emails to potential participants or others who may have suggestions, like Industrial Officers. However, as a matter of principle, "the most active people put their hands up and get selected", and this is normally the senior people (ibid). Nominations are seen as "a reward for good behaviour" (ibid). It follows that cross-border education is up for competition and seen as an incentive for compliant behaviour as opposed to a 'right to all'. Those who play the game to please their bosses are in the raffle box. Those who might be more suitable but are rather inactive, in compliant or allegedly underperforming are neither activated nor allowed to attend ETUI's multinational seminars.

The major reasons for the mass of rather inactive union members appear to be human and financial. First, "90% of union members would not know that the ETUI exists" (ibid). At the same time, the General Secretaries and Industrial Officers fail in approaching 'silent but suitable' members directly to apply for ETUI seminars. In addition, some General Secretaries

¹⁸⁹ O'Brien presented on Irish IR to Eastern European participants on an ETUI seminar in Romania. The audience did not know anything about industrial relations in Ireland and expected that the SIPTU tutor wanted to tell them how good the Irish IR system is. It took them a while to realise that "the [voluntarist] system looks good, but is not good", because employers are not obliged to talk to trade unions. Implementation and enforcement of collective agreements are likewise difficult, because employers may not feel bound by the agreements. In order to close representatives' knowledge gaps on the different IR systems in Europe, O'Brien suggests that participants should be given literature to read before the course. Better was a course on IR that acts as a prerequisite for participation in other transnational courses.

¹⁹⁰ O'Brien cites her own experience of an ETUI course on collective bargaining.

and Industrial Officers might consider themselves the most suitable applicants, so it is either them going or nobody.¹⁹¹

Therefore, a rather a small elite of activists and union managers becomes acquainted with colleagues from other countries whilst the majority of union members are not grown in transnational respects. Consequently, "learning from European projects went nowhere, because it is not mainstreamed" in the union and down to grassroots (ibid).

Between January and June 2014, UNITE had 272 (4.3%) learners in Ireland of 6,341 in total.¹⁹² Given a total membership on the island (ROI+NI) of around 59,521, this is a participation rate of 0.46% during the first half of 2014. Whether the small numbers of educated people are enough to have a wider impact will depend on the multiplier effect of training.

9.3.4.2.2. *Visibility*

SIPTU forwards its courses to Frank Vaughan (ICTU), who distributes the information to other affiliates. Course announcements are also sent to the branches. In the union's newspaper *Liberty*, no courses are announced, but there are advertisements for their Education and Development Scheme¹⁹³ as well as for Master's degrees in 'Women, Gender and Society' and 'Equality Studies' at UCD School of Social Justice.¹⁹⁴ Both postgraduate courses cover the international dimension. SIPTU educational activities gain most visibility through word-to-mouth from previous participants (O'Brien, 2015, interview).

Mandate advertises educational activities online, in the newspaper *Shopfloor*, in the magazine *Mandate News* and through flyers in the workplaces (Morrissey, 2015, interview).

TEEU publishes the course programme in the magazine *fusion* and on their website and emails shop stewards directly (Heading, 2015, interview).

¹⁹¹ The author experienced a similar attitude during her apprenticeship at Hach Lange GmbH in Berlin. Some employees would not give best marks for how the trainee worked in the department because they consider themselves best. Following this logic, an apprentice can never be better than the experienced staff. Hence, the second best mark was the best an apprentice could ever achieve.

¹⁹² Unite NOW! EC Report September 2014, <http://www.unitenow.co.uk/index.php/documents/documents/unitenow-executive-committee-reports/332-ec-report-september-2014/file>, accessed 14 June 2015.

¹⁹³ The scheme comprises three kinds of awards. 10 scholarships are available each year for members who wish to pursue third level studies. Up to 30 awards can help SIPTU members and their children to achieve their Leaving Certificate. The last awards is for members' children to learning Irish. *Liberty*, July 2014, p. 20.

¹⁹⁴ *Liberty*, July 2014, p. 11.

9.4. European Works Council Training at ICTU, SIPTU, Mandate and UNITE

ICTU (2013) has realised the need for EWC training. A working group of its Education and Training Committee has been working since 2013 on formulating educational activities for Board-level representatives, possibly also in view of activities offered by the future Workers' College. So far, Congress appears to refer EWC-related activities to the ETUI. As part of the Informia project, the confederation hosted a half-day event in TEEU on 4 November 2011 where two ETUI researchers (Jagodziński, O'Kelly) and an Education Officer (Varga) reported on the Directive, a case study and training needs.¹⁹⁵

SIPTU members are present in approximately 30 EWCs, including the Bank of Ireland, Aer Lingus (Irish), Bausch & Lomb (US), Henkel (Germany), Diageo (UK), Kerry Group (Irish) and Avonmore (Irish) (Kelly, 2015, interview).¹⁹⁶ However, through the retirement of Martin Naughton in 2012 and the failure in replacement and knowledge transfer to a successor, SIPTU has become quite inactive in EWC training. The union held only one EWC seminar in Manufacturing last year (Kennedy, 2015, personal conversation). EWC members from other divisions, like Service, may be sent to Manufacturing because the number of representatives is "not enough for individual training" (O'Brien, 2015, email).

Also hampering EWC seminars is the fact that not all EWC members are unionists. Hence, they would not attend SIPTU seminars. At the same time, the union suspects that "some management would encourage non-union 'safe' people to run" courses (ibid) since non-union EWC members might support management's ideas.

To refresh its organisational and organising strategy, SIPTU seeks to revitalise its EWC training activity. Thus, IDEAS has launched a project on EWC training in collaboration with EFFAT, CGIL (Italy), CCOO (Spain) and a trade union in Bulgaria which will be financed from 2015 to 2017 by the European Commission (Kelly, 2015, interview; Jones, 2015). The seminars evolving will take place in the project partners' countries. IDEAS will coordinate the training for SIPTU. "It is expected that the training will commence in September for Union Officials, to be followed by training for Shop Stewards and Activists with a final training course (hopefully early next year) for our EWC Reps" (Jones, 2015, email). The project shall yield the unions' "first systematisation and reinvigoration of EWC training" (Kelly, 2015, interview). The seminar contents in the other countries are probably not too different, yet they may differ in terms of priorities (ibid).

Mandate has two Irish representatives on the Tesco EWC (UK), where the union tries to set the agenda in collaboration with the British Union of Shop, Distributive and Allied Workers (USDAW). Currently, the union tries to push Primark for an EWC has an eye cast on Boots and

¹⁹⁵ <http://www.ictu.ie/unionlearning/events/2011/11/>, accessed 11 June 2015.

¹⁹⁶ Companies like Jacobs, Nestlé and Cadburys have left Ireland (O'Brien, 2015, interview).

Argos, IKEA, H&M, Aldi and Lidl “do not want to know about an EWC”, whereas Dunnes Stores do not communicate with Mandate at all. In addition to EWC training for Tesco, educational activities may take place for Marks and Spencers and SuperValue. Mandate EWC members are coordinated by the Head of Industrial Relations, Gerry Light, who may refer them to ICTU (Morrissey, 2015, interview).

As a result, UNITE seems, at the moment, the only union which can be called active in EWC training and consultation in the Republic of Ireland (O’Kelly & Vaughan, 2014). The union’s engagement in EWC training emanated from the Recast Directive 2009 and the simultaneous loss of national employment rights. The Directive gave rights and, hence, the opportunity “to get transnationally what you cannot get nationally”. An awareness-raising event for tutors followed for evaluating whether the Directive would be useful and for enabling them to develop course material. Therefore, a pilot course focusing on law and enforcement was held about 4.5 years ago. This activity is the basis for the EWC introduction course currently in place (Moctonian, 2015, interview).¹⁹⁷ Now, UNITE also uses EWC training as an organising tool (Vaughan, 2015, interview).

The initiative to investigate the EWC Recast Directive and develop courses sprung from two sources. On the one hand, UNITE’s International Department, in particular Jonathan Hayward, pushed the topic forward. He is the union’s only EWC agreement negotiator. On the other, the Graphical, Paper, Media and IT industries, which are represented by UNITE, have always been interested in international issues (Moctonian, 2015, interview).

Thus, the union offers an introductory EWC/SNB course called ‘European Works Council’ which runs once every quarter of the year from Monday 3pm to Friday noon in Esher Place. Predominantly, UNITE members from across sectors attend, but sometimes EWC members from other countries join; for example, Spain. Although they are from different industries that may have different forms of industrial relations, being novice to the subject is what unites the participants. Additionally, last year’s 3-day EWC seminar to review the Recast Directive together with academics and EWC chairs was so successful that a second one was organised for December 2015 (ibid).

Potential participants may learn about educational activities through the annual brochure which is distributed to trade union officers and the regions. However, some officers are better than others in forwarding the message; many would not be committed to training. Courses are also published online on the UNITE website (ibid). Esher Place is on Facebook and Twitter.

Moctonian (2015, interview) attended the annual ETUI Education Conference 2014 in Sofia. He concluded that ETUI’s idea of EWC training would not work for UNITE and would be

¹⁹⁷ The bill for EWC training, which UNITE put to EasyJet, caused in January 2012 the precedential case for the Central Arbitration Committee (CAC) over refusal to pay (Moctonian, 2015, interview).

“hard to develop in the UK” because it “is based on the idea of social partnership values” (ibid). British managers would, however, not be into social partnership and negotiation since they lack the compassionate attitudes necessary for constructive collaboration. Might ETUI’s EWC work be better applicable to the Republic of Ireland, then, given its long history of social partnership? Nevertheless, UNITE invited the two current ETUI EWC Officers (Demaître, Husen-Bradley) to Esher in order to find a way for collaboration. Because other forms of collaboration are possible, none of UNITE’s EWC trainers/experts is in the ETUI EWC trainer network (N.E.T.) (ibid).

In addition to partnership with the ETUI, UNITE launched, in June 2015, a transnational research project together with SYNDEX consultants – who are related to the biggest French union confederation CFDT – and Keele University in order to learn more about how EWCs in other countries make use of experts. As opposed to Germany and Spain, in Britain such a culture has been developed at all. The same is probably true for Ireland (ibid).

Conclusion

This chapter examined how Irish trade unions make their lay representatives and members fit for transnational teamwork, especially through developing their transnational competencies and distributing their knowledge, attitudes and skills.

The chapter started with outlining the form of adult education prominent in Ireland, which is Community Education. Community Education is also one pillar of trade union education. In theory, the pillar’s purpose is to empower the rather low educated as well as people at the margins of society and to prepare them as critical citizens through transforming traditional beliefs.

In practice, besides some trade unions’ affiliation and financial support to community education institutions like the People’s College, trade unions may offer, in their own training programmes, basic/advanced IT and Internet skills, English literacy training, courses for the unemployed and certificates to access third level education. These subjects are empowering in terms of individual employability, yet they seem unlikely to serve the development of critically and innovatively thinking citizens who challenge economic, political and social structures and provide transformative alternatives. Rather, these courses make people fit into current neoliberal structures unless the course contents raise controversial issues and criticise existing inequalities and discrimination.

The core focus of Irish trade union education is of a functional nature – namely, it serves the organisational development of the unions. Besides union staff training, the main concern of trade union education is, therefore, with facilitating labour representatives and union activists at the company level to fulfil their roles. The roles of shop stewards, representatives

of health and safety, equality, pensions, etc. are supported basically through knowledge and skills in economics, negotiation, collective bargaining, grievance handling, etc. The extent to which representatives' perspectives are enlarged in view of alternatives by critically considering broader social and environmental issues in Ireland, Europe and the world remains at the discretion of the tutor. Likewise dependent on the tutor is the extent to which are highlighted the social injustices deriving from economic and political structures as well as the organisations and people involved in reinforcing these structures. Recalling mobilisation theory, a perception of injustice is the key to transformative action (chapter 2). However, deliberate work on attitudes such as (international) solidarity is not emphasized in trade unions' educational programmes.

Instead, ICTU engages in development education through its 'Global Solidarity' programme, which sends financial support to countries in need and develops interested members as 'Global Solidarity Champions' who participate in collaboration with the developing world and advocate international solidarity in ICTU and other trade unions. Unlike DGB BW in Germany, topics arising from this programme are not integrated into trade unions' educational programmes.

In fact, except for the transnational trade union UNITE, Irish trade unions do not have any explicit transnational educational contents in their programmes. Equality and diversity as well as a Certificate in Trade Union Studies are the only places where cross-border issues appear. Thus, Irish trade unions do not seem to build workers' transnational competencies deliberately, and the benefits of overseas trips, transnational project management and collaboration with the ETUI, ETUFs and GUFs remain rather reserved for a small elite of activists, union managers and involved trade union staff instead of the majority of workers. Communicative competence comes naturally as a result of the English mother tongue, but they cannot be expected to naturally go beyond. Transnational competence development in creativity, imagination and emotions seems rather covert in Irish trade union education, if present at all, and requires further research. The same is true for transformative competence. With all this in mind, trade union education in Ireland cannot be said to foster transnational collective action significantly.

As remarked in part I, the reasons for neglecting transnational courses and the development of transnational competencies emanating therefrom is a matter of structures, organisations and persons – i.e., the result of individual and collective human decision-making. The difference in sectoral structures appears unsuitable to explain the absence of cross-border contents in Irish trade union education, because SIPTU, IMPACT, Mandate and TEEU are united in their limited (transnational) course offerings and their local focus. Rather, the national structures of industrial relations and trade union education seem to be a cause of the reluctance to invest more resources in transnational trade union education. The end of the

social partnership era has shaken up the Irish trade union movement immensely, and the trade unions are busy building a new fundament. In this situation, trade union education is considered a luxury because the generally short resources are perceived as needed elsewhere.

The Irish union confederation, however, seems to be trying to create something new from the ashes of social partnership, and this is a new national Workers' College. Indeed, the breakdown of social partnership offers, arguably, an opportunity to make things different than before. Why not rebuild the Irish labour movement as well as the anticipated national Workers' College through collaboration and consultation with other trade unions on the European continent as well?

That organisations and their embeddedness in national structures matter in terms of transnational trade union education is also illustrated by UNITE. The multi-sector, British-Irish union has its feet in two countries and is, therefore, markedly more advanced in its attention to cross-border topics. Although the range of their programme for Ireland is small, the union offers an introductory course for EWC members, reflects on 'Organising and Bargaining in the Global Economy', and maintains relations with Dan Gallin's Global Labour Institute. Unlike the other unions in the Republic of Ireland, UNITE has an international department.

The shortage in resources notwithstanding, Mandate has taken a step to expand their educational programme by a course which facilitates a broader economic, political and social awareness. To what extent this wider perspective is connected to transnational labour collaboration remains to be seen. Also questionable is the transformative impact which this course can have given that it targets the more senior labour representatives. Arguably, this course would be more effective if it were open to all, especially the new members.

Such a step, however requires, on the one hand, that labour representatives who demand transnational courses, as well as trade union staff, especially leaders, become committed to pushing transnational collaboration and education for it. Given the vast absence of educational activities that would develop Transnational Competence, the number of Irish trade unionists who want to transform the Irish labour movement through education is not enough to make a difference.

However, the future national Workers' College offers, arguably, an opportunity to deepen collaboration with ETUI Education and with the comrades in Brussels. The College's international orientation could also gain from integrating UNITE's more advanced experience into transnational courses. Likewise, as aforementioned, the Global Solidarity programme has potential for being integrated into the College in particular and Irish trade union education in general.

PART IV – TRANSNATIONAL TRADE UNION EDUCATION IN TWO DIFFERENT NATIONAL CONTEXTS

Conclusion

The final part of the thesis analyses trade union education in Germany and Ireland, with a particular view towards educational efforts that deal with transborder issues and, hence, are suitable for developing Transnational Competence (chapter 4). As in the previous part on the EU level, the share of knowledge, attitudes and skills in national trade union education was investigated.

German and Irish trade unions work in different varieties of capitalism and different industrial relations systems and have developed different traditions of trade union education. Moreover, within countries, the selected unions are active in various economic sectors. Yet, the unions in both countries share similar problems. Trade union education in Germany and Ireland is considered more a luxury than a core business. Education is one of the areas cut as soon as income drops. However, IG Metall in Germany and UNITE in Britain/Ireland appear least in financial difficulty, given their investment in educational centres.

Despite the limitation in resources in both countries, German unions spend more on education than their Irish comrades. Therefore, German trade unions offer an impressive amount of educational activities whilst the number of courses in Ireland is fairly small. Consequently, German trade union education could be expected to offer a lot more transnational courses. This, however, is not the case. The German sectoral unions dedicate only a small space of their activities to European and global issues. With the exception of UNITE, transnational educational contents are almost absent in Ireland. It seems, hence, fair to say that trade unions in Germany and Ireland do not engage much in transnational trade union education and transnational competence building, albeit German unions do a bit more than their colleagues in Ireland.

Trade unions in both countries share, moreover, a predominantly functional understanding of trade union education. The focus of educational activities is on keeping collective bargaining going at the company and sectoral levels. Therefore, labour representatives are equipped with knowledge and skills to perform their roles. Attitudes, however, are widely neglected. Given that education for transformative changes requires attention to all three areas – i.e., head, heart and hand – trade union education in Germany and Ireland are not geared towards fundamental changes at the structural, organisational and personal levels. Correspondingly, courses that relate to transnational creative/imaginative, emotional and transformative competence are least offered.

However, some signs suggest that German trade unions feel a greater need than before to involve themselves in transnational trade union education. Their collaboration with the ETUI

has improved just recently. Nominally, the amount of courses with cross-border contents has been increasing in both Verdi and IGM since 2011 and 2010, respectively. IGM's international department initiated three transnational educational projects between 2009 and 2012, and the union hired, in January 2015, a second EWC expert. Possibly, differences in sectoral conditions and resources in the manufacturing industry can explain some of this sector's higher investment in transnational education in comparison to the service sectors.

For Irish trade unions, to the contrary, the breakdown of the social partnership has shaken the movement considerably, and trade unions perceive the need to restructure their organisational bases as well as the movement. Thus, the Irish labour movement could integrate education into the restructuring process and give it a key position. It remains, thus, to be seen what place in the movement the anticipated national Workers' College will get, how it will be connected to the ETUI, and how the College will utilise the Global Solidarity programme for developing new courses and exchange programmes.

After comparing the national levels, the final chapter of this thesis concludes the empirical findings on the European and national level (part III and IV) in light of the analytical framework (part II) and offers some recommendations for improving trade union education for enhancing cross-border collaboration.

CHAPTER 10 – CONCLUSION

This research project set out to determine the extent to which trade union education in Ireland and Germany and at the EU level fosters labour representatives' transnational competencies and to identify major challenges to achieving this.

The point of departure is the fact that trade unions in Europe and the world do not work well together across national borders. Joint transnational actions are rather the exception than the rule. The number of successful transnational actions, such as the Right2Water campaign, are even less. Similarly, only a small minority of European Works Councils (EWCs) appears to provide effective 'countervailing forces' to transnational corporations (TNCs). The vast majority of cross-border labour representative bodies seem to work well below their potentials.

Part I suggests that the reasons for success and failure in transnational labour collaboration can be found in structures, organisations and individuals. The focus of this thesis is on individuals and their individual and collective decision-making, as this area has remained underexplored. Competition – which arises through people's fear to lose out in comparison to others – has, for instance, always been a trigger for transnational solidarity. Especially, competition between TNC's plants seems to impact cross-border labour collaboration. The examples of GM Opel, BMW and Volkswagen show that inter-plant rivalry can be both an extrinsic origin and an intrinsic reason for transnational teamwork.

In addition, politicians' support as well as their decisions to set up and change institutional frameworks may support or undermine trade unions and labour representatives in their efforts to work together across border. One might argue that the weaker labour's institutional power at national level is, the more incentive trade unions have to look for allies across borders. As we see from the German and Irish cases, however, this hypothesis cannot be supported. Irish trade unions, which are less institutionally supported than German unions, are less engaged in transnational trade union education. Arguably, therefore, Irish trade unions are less interested in cross-border collective action than their German comrades. It follows that weak national institutional embeddedness does not always push trade unions to transnational teamwork, whereas strong national institutional power can also be an enhancing factor to it.

The relations between and within trade unions in Europe and the world are also influenced by substantial geographical, strategic and ideological divisions.¹⁹⁸ For transnational labour collaboration to improve, these geographical, strategic and ideological divisions must be

¹⁹⁸ Geographically, on both the blue continent and planet, the labour movement appears separated along four imperialistic lines. Traditionally, the more developed North/West dominates the developing South/East. In 'imperialism reversed', the more developing countries starve the modern emperors. 'Inter-imperialist rivalry' (Bieler, 2013) describes the power struggles among labour in the more developed countries. Battles between labour in developing countries shall be called 'inter-oppressed rivalry'.

Moreover, trade unions may have different strategies for union organisation (hierarchy/authority/resources) and tackling the same problem (lobbying/campaigning/striking/alliances, nationally/internationally). Also their ideology regarding international solidarity (priority/trust/commitment) can be unequal.

overcome, and trade union education can, arguably, facilitate labour in so doing. However, resources in appropriate quality and quantity must be invested in transnational trade union education if education shall act as a strategic tool to enhance cross-border collective action. Trade unions in Germany and Ireland largely complain about the lack in resources, and the ETUI, at the European, level could do with more money and staff. Hence, the potential of (trans)national trade union education has remained underdeveloped among the European labour movement.

However, material and human resources are not the only resources available. Trade unions can also build socio-organisational, moral and cultural resources. In terms of the latter, a novel form of transnational collaboration – New Labour Internationalism (NLI) – can foster joint transnational action. Another important cultural resource is collective identity. This thesis argues that trade union education can support labour in building both NLI and collective identity.

In order to delve deeper in the realm of the individual, three areas of the worker's self were outlined: individual commitment, perception/composition of self and perception of others. The different forms of commitment are conceptualised as *constructive*, *destructive* and *transitional/neutral*. Arguably, only constructive commitment can foster transnational labour collaboration and has the power to develop a new form of international solidarity. Mobilisation theory tells us that the perception of *injustice* triggers action, but also that perceptions of *power* and *pace* are crucial for developing constructive commitment to transnational teamwork (chapter 2). Ideally, these mental-emotional states of being are forged by the fire of positive, high-energy emotions such as compassion and empathy, instead of negative, low-energy emotions like fear and anger.

The perception/composition of self is illuminated through the concepts of social character and personal identity. Erich Fromm provides us with descriptions of the *necrophilic*, *authoritarian* and *biophilic* or *productive* social character, helping us to explain which form of commitment towards transnational labour collaboration workers create. Conversely, the form of commitment shapes the social character. The majority of workers and their representatives have developed rather authoritarian social characters. For improving cross-border collaboration, more productive social characters are needed. Trade union education could provide a space for workers and their agents to transform their social characters.

In terms of personal identity, it is argued that, for fostering cross-border labour collaboration, workers and their representatives must to add to their national identity a transnational dimension and become culturally hybrid. Transnational personal identity would mean having one's feet in at least two societies. For developing global citizenship and advancing the process of the humanisation of human society, global personal identity appears

essential. Eventually, labour must embrace transnational activities and identity building as a transformative journey. Trade union education has the potential to prepare and accompany labour on this journey.

The perception of others is marked through the concept of social identity. For improving labour collaboration beyond national borders, workers and their representatives need a sense of belonging and sameness not only towards workers and their situation in other countries, but, ideally, toward all human and other living beings in this world. This sense of all-encompassing brotherhood and sistership requires labour to create an *imagined community of fate*; 'imagined', because most earthly inhabitants cannot be personally known; 'fate' to embrace the interconnectivity of all beings and the common aim to survive and thrive.

Social identity is the basis for solidarity. Solidarity is not purely altruistic, but it includes egoism too. Sayer (2011) calls such two-sided perception 'emotional reason'. Importantly, solidarity springs from the heart and soul. It is a form of human collaboration motivated by compassion to self and others – i.e., 'generosity of spirit' (Arnsperger & Varoufakis, 2003). Collaboration that evolves from the mind and rational-calculative considerations, such as self-interest, cannot be called solidarity. Trade union education would be the appropriate place where the concepts of solidarity and identity are reviewed.

In sum, part I showed that workers and their representatives face huge challenges which have hampered them in involving themselves more, and more effectively and efficiently, in transnational collective action. Another challenge is to identify the opportunities among these challenges. Only a few of those labour representatives, union activists and officials who seek cross-border collaboration have achieved some success. The majority, however, seems not eager to take up the challenges or fails in overcoming them. Arguably, successful joint cross-border actions must not remain isolated once-off achievements, but they must be mainstreamed and connected if labour is to become a powerful 'countervailing force' and eye-level partner to global businesses.

The thesis argues that trade union education can facilitate labour in overcoming these challenges, finding the opportunities and taking action. Essentially, trade union education can support labour in the transformations which the structures, organisations and people of the movement require for growing into powerful transnational actors.

Before suggesting solutions for the issues around transnational collective action, however, we must know more about why it is actually a problem that cross-border labour collaboration is profoundly flawed.

Firstly, capital has been active internationally for more than three decades and the trend is increasing. Business managers' main concern is unlimited growth of profit and

competitiveness through the exploitation of resources. Business owners who take responsibility for the resources used and shared with their workers voluntarily are exotics. Social entrepreneurs in Europe, for instance, contribute a mere 10% to the European economy measured by Gross Domestic Product (GDP) and employ only 4.5% of active workforce (European Commission, 2014b). Therefore, labour must fight, not only for their recognition in the economic production process, but also for preventing human genocide. For so doing, workers and their representations have to be organised internationally, too, if labour wants to be an equally strong counterforce.

Secondly, while European and global capital has gained through technological progress as well as in economic space and power, trade unions in Europe have lost bargaining power, political support and social legitimacy. Since the 1980s, national union membership has been declining. Consequently, mobilisation and financial capacity has suffered. At the same time, most of the world's workers have not been organised so far. Likewise, since the 1980s, Reaganomics and Thatcherism have brought neoliberal ideology to the fore. The ongoing crisis in Europe underpins, once again, that institutional deregulation and technocratic decision-making is en vogue in Brussels and pushed particularly by the German government. Correspondingly, European citizens elected, in May 2014, a centre-right government, which reflects the vast majority of national centre-right governments on the continent. The voters, 43% of European citizens, obviously support a business-friendly agenda. This would also include decreased understanding of strike actions, especially those which interfere with public services, like schools, transport and waste collection.

As a result, the power has shifted on multiple levels and in several ways at the expense of workers. Human rights and other social standards are, thus, in great danger to 'race to the bottom', whilst the destruction of nature rises. Equally jeopardised seem the human and labour values of justice, equality, democracy, solidarity, sustainability and freedom.

In order to stop the increasing social inequalities and exploitation of resources, in short, the dehumanisation of life, labour must regain power. Moreover, workers and their representatives urgently need to present viable alternatives for economic, social and political governance as well as the treatment of nature. For so doing, trade unions have to find new ways and means of labour representation, since the traditional ones have become insufficient for today's complex challenges.

One possibility for trade unions to revitalise is searching for allies across borders. Indeed, we may find several examples of cross-border labour activities, such as the creation of the European Trade Union Confederation (ETUC), European Trade Union Federations (ETUFs), European and World Works Councils, European (EFAs) and International Framework Agreements (IFAs), Global Trade Union Federations (GUFs), etc. Given the significant loss in

labour power over the last three decades, however, all these organisations, bodies and institutions have remained fairly ineffective and inefficient.

10.1. In Search for Solutions

In a quest to improve transnational labour collaboration and increase the impact of cross-border labour representative bodies, this research project makes a case for education. A number of studies have shown that education has played an important role in the rare cases in which labour was successful in joint transnational actions (e.g., Bernaciak, 2010; Erne, 2008; Novelli, 2011; Whittall, 2000). Arguably, trade union education can facilitate labour representatives as well as union activists, officials and members in the learning processes through which they have to go in order to overcome the challenges of transnational collective action, helping them to find the opportunities for working together beyond national borders, putting mobilisation theory into practice. By going through these learning processes, workers and their organisational agents can transform themselves, individually as well as collectively as a representative body, into a trade union as well as a social movement.

However, trade union education can also limit labour from becoming powerful transnational actors if education is not understood as a tool for transformation. Transformation cannot be achieved if trade union education is understood functionally like school education, where people are trained to adopt a certain role in a system and comply with the rules in the organisations which reinforce this system. A functional understanding of education trains people to behave in a certain way which is dictated top-down by the few beneficiaries of the system. A transformative understanding of education educates people to revolt against the injustices of a system and to create changes bottom-up in view of social equality.

Critical education, which is needed for transformation, makes people understand their roles in the broader context. Critical educators like Paulo Freire go even further and see the aim of transformative education in the humanisation of man. Given the wars as a result of political power games, religious extremism, economic exploitations, environmental destructions and social inequalities in this world, human beings must indeed become more humane – i.e., follow their hearts and be more compassionate to self and others as well as move away from class thinking.

In brief, functional education trains people to react whereas transformative education facilitates people to pro-act. Thus, transformative trade union education can be a platform from which successful transnational labour collaboration arises – however, labour must utilise it. In turn, scholars must support labour in utilising and improving transformative trade union education and collective transborder action through research.

The extensive literature review underlying this PhD project, however, showed that trade union education has remained an underresearched field. Although scholars have pointed to the importance of education in successful transnational collective action, they have not gone beyond. Studies have been missing in which trade union education as such is analysed. Likewise, studies have been missing in which trade union education is analysed in view of its potential to mainstream successful cross-border labour activities. This thesis is a first step towards closing these gaps.

Therefore, chapter 3 investigated the theory of education. After approaching the concept more generally as a right, an industry and several philosophies, the focus narrowed to trade union education as a particular part of adult education. Interestingly, Sayer's (2011) abovementioned interconnected notion of 'sense of love' and 'sense of duty' is also reflected in the meaning of education. Etymologically, too, education has both a functional and a normative purpose. On the one hand, human beings may train and mould themselves and others for a specific aim. This aim can be in the service of the social elite (top-down domination) as well as the individual (bottom-up emancipation). On the other hand, human beings may strive to lead out and develop themselves and others on their path towards their vocations and, hence, their true selves.

However, due to the dominance of neoliberal ideology in Europe and the world, compassion for self and others – the social side of the being human – appears to have been suppressed by market forces. The meaning of education seems reduced (almost) exclusively to functional purposes. Allegedly, common goods like education have increasingly become a tool in the service of economy. On the one hand, education is used to create effective and efficient workers who comply with business interests. On the other, education is used to prepare consumers who buy more, and more often, than they need to live a genuinely happy life.

Parallel to the increased commodification of education, trade union education has moved towards a market-orientation, too. A shift from broader political education towards a focus on skills and competency training is visible as a consequence of union leadership and tighter resources. Trade union education is, thus, in danger of being reduced to 'ökonomische Zweckschulung' (Negt, 1974) – i.e., limiting educational activities to serve the organisational core business of collective bargaining, interest representation and mobilisation whilst broader insights into social, economic, ecologic and political circumstances from local to global level are neglected.

Training for fulfilling the functional purposes of trade unions is, however, insufficient for national as much as transnational collaboration and mobilisation. In addition to knowledge and skills, the underlying motivations for international solidarity and participation in cross-border actions must be addressed, and these are attitudes. As highlighted in chapter 2, mobilisation

theory has found that people take action if they perceive that something is unjust, that they have the power to change it and that the time dynamic of circumstances is manageable. The perception of injustice is, furthermore, linked with the violation of personal values, most of all justice and equality. People do not protest if they know about issues and have the skills to act upon them.

Thus, if labour wants to renew its national, European and global movements through transnational teamwork, trade union education must provide knowledge, attitudes and skills which, utilised together, can build a culture of New Labour Internationalism (NLI).

This being said, trade union education must be holistic and address all four human elements. The mind represents knowledge (Klassenwissen), e.g. the commonalities and differences in industrial relations systems. The heart embodies emotions, most importantly compassion and solidarity (Klassengefühl). The body stands for union/class action (Klassenkampf), such as (trans)national collaboration and the tools needed therefore. The soul is the basis for imaginations that picture not only the abovementioned 'community of fate' but also alternative organisations of society, economy, politics and treatment of nature. The alternatives are based on labour values like justice, equality, democracy and sustainability. We might call this fourth area 'Klassengeist' (class spirit). If labour moves further on the way to humanisation and pursues a classless society, however, we need to find another terminology.

For facilitating labour in proposing alternatives and pushing actively for them, trade union education must adopt an appropriate pedagogy. Predominant are the humanist and progressivist philosophies. Suitable for labour renewal, (trans)national trade union education as well as improving international labour and human solidarity, seems, however, only the radical educational philosophy. Following the radical strand, Freire (2000, 2002) and Negt (1974, 2010) have developed a critical-emancipatory approach to education which appears highly applicable to trade union education. Critical pedagogy is holistic as it touches upon all four human elements: it is deeply cognitive (connected knowledge, alternatives), affective (suffering, fears, hopes), spiritual (utopian visions of a classless society and the humanisation of man/human completion, values of equality, justice and liberation from oppression) and active (counter-hegemonic actions).

In addition to determining the suitable educational approach, a proposal is needed for what, concretely, labour is to be educated in. Chapter 4 suggested that Transnational Competence (TC) can enhance labour's constructive collaboration across borders. Emerging from cross-disciplinary research, TC comprises five sub-competencies: *analytic*, *emotional*, *creative/imaginative*, *communicative* and *functional*. Koehn and Rosenau (2002, 2010) characterise their concept further as relative, contextual and holistic. In order to liberate TC from its originally business-inspired functional purpose, account more for its proposed holistic

nature and align it with critical pedagogy, a sixth sub-competence has been added, called transformative. For applying TC to trade union education, the contents of the six competencies was derived from the lessons which the challenges to cross-border collaboration have taught (chapter 2).

10.1.1. The Present Situation

Transnational labour action is rare, and successful outcomes are even rarer. Trade union education can play an important part in enhancing cross-border collective action not only in numbers, but also in effectiveness and efficiency. Action is always dependent on individuals and their decisions, and education is destined to influence both. Hence, education will require a much stronger role within the labour movement than it has been given so far, if labour is interested in mainstreaming successful cross-border activities. For so doing, not only needed is for trade union education to be generalised on structural, organisational and personal level, but also developing the transnational competencies of workers and their agents.

In order to evaluate European labour's decisions in terms of (transnational) trade union education and its suitability to trigger learning processes and transnational collective action, the study used a holistic research design (chapter 5). Amongst others, the holistic view is created through methodological triangulation and a comparative perspective regarding levels, industries and nations (multi-level, multi-sector, cross-national). Based in Europe, comparisons are made vertically between the national and supranational level, as well as horizontally between two EU member states and unions from different sectors within these states. The case of European Trade Union Institute (ETUI) as the leading provider accounts for trade union education at the European level (chapters 6 and 7). The national level is exemplified through Germany (chapter 8) and Ireland (chapter 9). In both countries, the educational activities of the union confederation are explored in addition to selected affiliates representing different economic sectors.

Trade union education and its attention to TC in Brussels, Berlin and Dublin is assessed along three points. Firstly, the significance of transnational trade union education is established. In a second step, the knowledge, attitudes and skills provided are examined in terms of their distribution. Finally, it is analysed how the trade unions' educational activities cover each of the six transnational competencies.

10.1.2. Significance of Transnational Trade Union Education

10.1.2.1. EU Level

The European Trade Union Institute (ETUI) can be seen as the leading provider of trade union education at the European level. On the one hand, the Institute is the extended yet independent arm of the European Trade Union Confederation (ETUC) and, thus, is the European voice of workers. On the other hand, the ETUI is politically recognised by the European Commission through funding.

The ETUI has one mission, and this is to 'support, strengthen and stimulate' the European labour movement. For achieving this mission, the goal of ETUI Education is to facilitate the culturally and institutionally different national labour movements to create joint and successful transnational actions. For so doing, the department aims, on the one hand, at developing a European trade union identity which reflects the European Union's motto 'united in diversity'. On the other, the ETUI Education promotes education as a strategic tool which is inevitable for trade unions to achieve their goals from the local to the supranational level. We may, thus, notice that the Education Department's mission relates to both labour ideology and interests. Expressed through Sayer (2011), ETUI Education's mission includes a sense of love and duty.

Transnational trade union education is the ETUI Education department's daily 'bread and butter'. ETUI Education seeks to establish a European dimension in their educational activities. This includes not only the course content, composition of participants and trainer team(s), but also the selection of venues and the willingness to accredit two more courses according to the European Qualifications Framework (EQF). The educational activities are supposed to complement those at the national level. The Department's partnerships reach from the national to the international level.

The ETUI works at the service of trade union staff in supranational labour organisations and institutions – i.e., European Trade Union Representatives (ETURs). Moreover, European company-level representatives – i.e., members of European Works Councils, European Company Representative Bodies and Special Negotiating Bodies (EWC/SERB/SNB) – are all addressed. For expanding the transnational dimension in trade union education and building a bridge between the national and European level, so-called 'Eurotrainers' are developed. The latter are not considered in this project because train the trainer courses are not directly relevant for enhancing cross-border activities.

For all three areas, a respective learning pathway has been in place since March 2013. Yet, ETUR training is no core business for ETUI Education because the European Trade Union Federations (ETUFs) and other bodies have not integrated structured education into their organisational strategies. If at all, ETUFs prefer one or two workshops a year to discuss a current issue. These workshops seem to be organised through the initiative of the ETUI rather

than the proactivity of the Federations. Educational activities for EWCs/SERBs/SNBs as well as Eurotrainers are ETUI core business, indeed. Also core to ETUI Education are activities for national union staff and labour representatives with current and future supranational responsibilities.

Generally, the Beckers EWC training case suggests that (trade union) education can provide five spaces: 1) a *space of encounter* (Ort der Begegnung), 2) a *space of exchange* (Ort des Austausches), 3) a *space of insight* (Ort der Erkenntnis) and 4) a *space of action* (Ort des Handelns). Together they can form a fifth *space* – i.e., one *of development* (Ort der Entwicklung) – as a person as well as a group. It remains unclear, however, what impact the low number of 2,000 annual ETUI participants can make (i.e., whether course participants create a significant multiplier effect).

10.1.2.2. Germany

German trade unions seem to have a sense of duty to transnational educational activities, some more than others. In 2015, approximately a fifth of around 250 DGB Bildungswerk BUND (DGB BW) courses were of transnational concern. Verdi offered approximately 470 educational activities, where about 12% reach beyond national borders. Just over 8% of education at IG Metall (IGM) can be considered transnational. Roughly 200,000 people, or 3.3% of DGB membership, participate in the educational activities every year.

Over time, it is difficult to say whether transnational issues have gained importance in German trade union education. Nominally, a clear upward trend in the amount of transnational courses has been visible for DGB BW and IGM since the mid-90s. As for Verdi, the trend has been opposite since its founding in 2001, notwithstanding a new uprising since 2011. The share of transnational activities in the unions' educational programmes points to a different picture, though. Both DGB BW and Verdi appear quite stable in their consideration for cross-border concerns. IGM, by contrast, increased steadily the share from the very low of 1.4% in 1996 to the peak of 12.8% in 2004. Since then, the share of transnational courses has dropped to 8.2% in 2015.

In essence, transnational trade union education is present in the German trade union movement but is a rather a minor field of concern for the sectoral unions compared to the plethora of their other educational activities. As for DGB BW, local works and staff council training is the educational focus of both Verdi and IGM. Since DGB BW must actually stay away from company level and keep up their programme for labour representatives for historic reasons, the confederation appears to engage considerably more in cross-border education than its affiliates.

Interestingly, the vast majority of transnational educational activities are placed within trade unions' political education. If trade union members look beyond national borders, they do so more in the role of educational leavers than labour representative and trade union activists – unless representatives and activists take their educational leave for cross-border political education. Thus, German workers and their representatives appear to view transnational labour collaboration and solidarity actions more as a luxury than part of labour's daily 'bread and butter'.

Nonetheless, both Verdi and IGM engage in EWC training, whereas IGM is more active than Verdi due to the international orientation of the manufacturing industry and fewer financial shortcomings. Therefore, IGM has also integrated into their organisational structure an international department which is responsible for organising transnational courses and expanding collaboration with European comrades through multi-national projects, usually funded by the EU.

In sum, German trade unions have some sense of love and duty for building a European labour identity and using education as a strategic tool for enhancing transnational teamwork. Besides transnational political education, this sense is mirrored in Verdi's and IGM's involvement in EWC training. Compared to the other educational activities, however, transnational trade union education is not a priority. Moreover, the impact of transnational courses is questionable because they target mainly those people in the trade union who are less powerful and active than works council members, health and safety representatives and other activists and multipliers. Hence, similar to the ETUI, it remains doubtful whether the small amount of transnational educational space and a largely inappropriate target group is sufficient to build a critical mass that effects and multiplies transformative change. Some signs indicate that the sensibility for transnational teamwork is slowly increasing, though.

10.1.2.3. Ireland

As in Germany, Irish trade unions concentrate their education on the workplace, which is the company as well as the trade union. Common in the programmes of the confederation as well as its affiliates are courses for union representatives, such as shop stewards, and health and safety and equality representatives. The number of educational activities is only a fraction of the German volume. In 2015, it ranged from one course for workplace representatives at IMPACT to 30 courses scheduled by the Irish Congress of Trade Unions (ICTU).

Irish trade unions pay little attention to transnational concerns in their education. Cross-border issues are usually addressed through courses or modules on equality and diversity and may be integrated into certificate and third level degree courses. Global political education has been linked, so far, exclusively to developing countries through the ICTU Global Solidarity

programme. Mandate is about to introduce a course that would provide a broader political perspective. However, this course targets the more experienced lay representatives instead of being a basis from which shop stewards and other trade union members are to proceed.

A transnational union itself, UNITE seems the most developed in terms of transborder contents, and it is the only union with an international department. In addition to the equality and diversity course, the union stands out for a course on organising and bargaining in the global economy, Black and Asian ethnic minorities as well as an EWC cross-industry seminar that is run four times a year besides regular EWC body training. Also, the International Summer School of the Global Labour University is open to members.

Besides the fairly small number of around 2,000 course participants each year (2.6% of ICTU membership), transnational education and collaboration remains more a matter of an elite group of union leadership, selected staff and activists as opposed to the masses of workers. Trade union leaders can be involved in ETUC and ETUF committees and may be more or less active in their international affiliation duties. Lay representatives and trade union staff may participate in ETUI and ILO courses. Also prominent is collaboration through cross-border projects, for example with the ETUI and other national and international trade unions. Collaboration with the ETUI appears quite regular, particularly through ICTU.

However, it seems rather unlikely that transborder relations deepen through visits and joint projects alone in addition to travels and disconnected, once-off transnational actions. Moreover, what about the vast majority of members who neither have any activist function nor anticipate one in the future, but are yet supposed to participate in cross-border activities?

The sense of love and duty for building a European labour identity and enhancing transnational collaboration through education seems fairly insignificant among Irish trade unions.

10.1.3. Education Triangle: Distribution of Knowledge – Attitudes – Skills

Depending on the type of unionism on the 'eternal Hyman-triangle' between market, class and society, trade union education programmes can be expected to meet educational purposes and human elements to different degrees and understandings. It is suggested that:

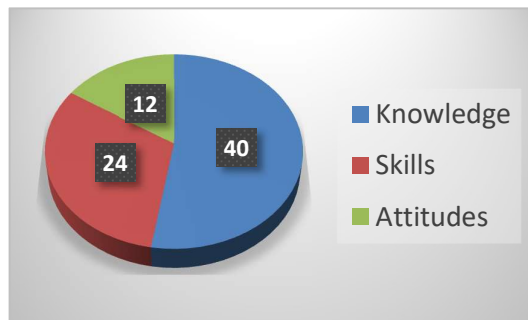
- market-oriented unions focus their education programmes more on skills training for union membership and members' employability (concentration on the hand/body);
- society-oriented unions are more likely to concentrate on knowledge on events and issues (concentration on the head/mind); and
- class-oriented unions can be expected to emphasise more union and class consciousness and identity (concentration on the heart).

As a result, different union types would develop different labour spirits – i.e., organisational and workers’ ideologies, or souls – as much as different cultures of trade union education. What are the education triangles like at the EU level, in Germany and in Ireland?

10.1.3.1. EU Level

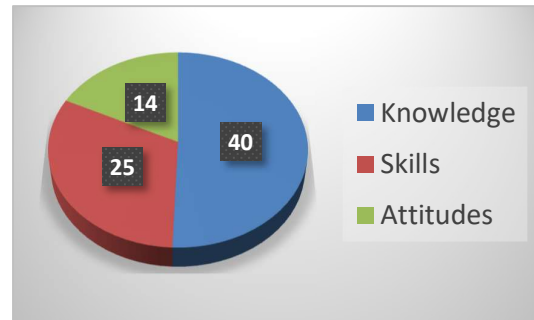
The ETUI Education Department takes a social constructivist approach to education. From the analysis of the ETUI ETUR and EWC learning pathways, it emerges that trade union education at the EU level covers the full education triangle of knowledge, attitudes and skills. However, the three areas are distributed unevenly. Knowledge takes minimum half an educational space, skills are given almost a third and attitudes receive the remainder of approximately a sixth (Figures 10-1 and 2).

Figure 10.1-1: **ETUR Pathway**



Source: own illustration

Figure 10.1-2: **EWC Pathway**



Source: own illustration

Thus, ETUI Education seems to have established a hierarchy of facts, functions and feelings (respectively, head, hand and heart), where learning facts is considered most important. The fact that the education of emotions is not given a deliberate place in ETUI courses, but is addressed rather in between the lines, tends to strengthen this hierarchy.

Furthermore, supportive for the assumption that the heart element is purposely side-lined whilst the mind is put into the centre of ETUI educational activities is the way the education triangles are ordered in the documents that present the ETUR and EWC pathways, which is knowledge followed by skills and attitudes. However, this order is neither in line with the human body composition top-down (head, heart, hand), nor with Bloom’s taxonomy which the ETUI (2013b) refers to in their guide to effective learning. So, the fundamental structure of the ETUR and EWC learning pathway reflects neither human nature nor the latest official ETUI-ILO education guidelines (ETUI, 2013b).

However, it is not only a matter of quantity and structure to evaluate the distribution of knowledge, attitudes and skills, but also of quality. Therefore, the amount of skills and attitudes might be sufficient for what makes effective and efficient supranational labour

representatives and union staff, whilst knowledge may be not. In fact, neither the ETUR nor the EWC pathway entails knowledge on mobilisation theory (see chapter 2). Moreover, the ETUR pathway refers to understanding the differences and challenges among European labour, but not to the commonalities and opportunities. The knowledge in both pathways requires alignment with skills, so that ETURs and EWCs can connect issues from local to global level instead of stopping at European borders.

Regarding skills, it seems inappropriate that campaign management is taught to ETURs but not EWC members. EWCs can also be a space from which joint cross-border campaigns and other actions arise. Even if EWC members lack resources to manage campaigns, they should at least be prepared to actively participate in the mobilisations that ETURs have organised. Participation in transnational campaigns as well as any other cross-border activity can enhance, conversely, representative's attitudes and, eventually, their European (labour) identity.

English has been chosen as the common language for both ETURs and EWCs. Whilst this choice is arguably appropriate, it creates a resource imbalance within the labour movement. The comparably few officials from the English-speaking countries have a resource advantage, whereas the mass of delegates from all other European countries have a resource disadvantage.

The ETUI Education department appears, moreover, to have difficulties in clearly defining affective aspects. The list of attitudes of both learning pathways sounds more like a mixture of skills, characteristics and attitudes than exclusive ways of thinking. Especially missing is an explicit specification of what exactly trade union values across Europe and the world actually are. Also questionable is why EWC members are supposed to avoid conflicts, but shall also solve them once they have occurred, where ETURs are required to manage conflicts. This difference notwithstanding, doubtable for both groups is whether they are encouraged to actively raise conflicts. Inbuilt in the two learning pathways seems, hence, a learned fear of confrontation and rather reactive behaviour as opposed to developing self-confidence and pro-activity, probably for EWCs even moreso than for ETURs. Avoiding conflicts is surely a road to concession bargaining at the expense of workers because representatives may give in to employers' demands too soon for the sake of interpersonal and inter/intra-organisational harmony. After all, labour always talks about class struggle and not class defence.

In conclusion, the ETUI focuses on knowledge, provides some skills and addresses attitudes the least. It follows that trade union education at the EU level is closest to 'society', leans most towards the 'market' and creates a working 'class' a little bit. This result is in stark contrast to the ETUI's mission to develop a European labour identity which requires both knowledge and attitudes. Since all three areas are covered, though, the point on the education triangle is not on one of the sides, but slightly towards the centre.

10.1.3.2. Germany

DGB BW has followed a social constructivist approach to education, like the ETUI, but is in transition to critical-emancipatory education. Both Verdi and IGM have already adopted critical pedagogy.

As opposed to the philosophy of critical pedagogy, all three German trade unions seem to understand trade union education as the provision of knowledge and skills. Similar to the ETUI, DGB BW and Verdi appear to consider the development of attitudes as self-evident and as the responsibility of trade union members. IGM attends attitudes explicitly, but puts them secondary to knowledge and skills. Since German trade unions do not have any structured description of trade union education comparable to the ETUI ETUR and EWC learning pathways, however, it is difficult to assess the extent to which knowledge, attitudes and skills are actually taught.

Interestingly, the official organisational view does not necessarily meet the perspective of educational staff. For the Verdi GPB executive director, trade union education includes head, heart and hand in equal amounts; he describes education as an interconnection of *Wissen* (knowledge), *Wollen* (desire) and *Können* (ability).

According to mobilisation theory (chapter 2), attitudes are the centre from which action arises. Therefore, if anything, attitudes need to be given the central place in German trade union education, where knowledge and skills serve to form attitudes, and not vice versa.

In conclusion, trade unions in Germany seem to confirm their organisational identity between 'society' and 'market' through their understanding of trade union education. If attitudes are present, they are subordinated to knowledge and skills. Thus, the more that attitudes are covered, the more the point on the education triangle moves away from the side towards the centre.

10.1.3.3. Ireland

The pedagogical approach in Irish trade union education is not as clear as in Germany. It appears hard to find any reference to a particular kind of educational approach in relevant documents. In practice, the educational approach appears a constructivist base from which some tutors may tap into critical pedagogy.

Similar to Germany and contrary to critical-emancipatory education, trade union education programmes in Ireland concentrate on developing knowledge, skills and competence. The heads and hands of mostly workplace/health and safety/equality representatives and pension trustees are trained, usually, in negotiation, communication, project management, occupational first aid, personal effectiveness, effective meetings, conflict management, dealing with redundancies and grievances, etc. These are the daily tools they need for enforcing

workers' limited national statutory rights and handling employers' labour-hostility. It seems, therefore, reasonable to say that skills training is at the centre of trade union education on the green island.

Only a few course titles and certificate modules indicated that inequalities and discrimination are discussed, mostly through the subjects of equality and diversity. The trade unions seem to maintain that labour representatives bring with them the appropriate attitudes for their roles and develop trade union values like solidarity and fairness 'on the job' through their daily work.

The official disregard of developing attitudes may be partly compensated by tutors. Some voices suggest that attitudes towards building the trade union and solidarity are trained on the course. In other words, there may be more inside the educational activities than can be seen from the outside. However, given that transnational contents are not significant in Irish trade union education, it appears doubtful that attitudes are built which are suitable for improving cross-border collaboration and action.

In conclusion, trade unions in Ireland focus on developing labour representatives' skills and provide complementary knowledge. Thus, as opposed to the proposed position between 'market' and 'class', Irish trade union identity appears clearly market-oriented, with a glance towards 'society'. If at all, attitudes are given less consideration than in Germany, also due to the small volume of educational offerings. Compared to the EU level and Germany, trade union education in Ireland seems situated least towards the triangle's centre.

10.1.4. Transnational Competence Profile of Trade Union Education at EU Level, in Germany and in Ireland

The extended concept of Transnational Competence (TC) comprises six sub-competencies: *transformative, analytic, communicative, emotional, creative/imaginative* and *functional* (chapter 4). Transformative competence relates to the human elements of heart and soul and targets the areas of ideology, emancipation, wisdom, vision, spirit and (r)evolution. Analytic competence represents the mind and addresses critical analysis and understanding of issues and their role in the broader perspective. Communicative competence is a matter of the mind and heart. This competence concerns language proficiency, active listening, open and honest communication as well as win-win negotiation. Emotional competence is embodied through the heart and includes the openness to transformative change, self-confidence and curiosity to meet the unknown, a drive for lifelong and lifewide learning, and, most of all, compassion toward self, others and nature. Creativity and imagination are facilitated through the mind and soul. The creative/imaginative competence stands for utopian and boundless thinking, especially in terms of the global community of labour as well as alternatives that make the

world of work and life more humane. Functional competence is symbolised by the body element and refers to transnational skills like researching, networking, managing conflicts, projects and people, working in teams, etc.

The following section assesses the extent to which trade union education made by the ETUI, DGB, ICTU and its respective selected affiliates fosters each of the six TC sub-competencies.

10.1.4.1. Analytic

As outlined before, trade union education at the EU level as well as in Germany and Ireland has a strong focus on the provision of knowledge. Therefore, the analytic competence seems quite well attended, as far as the transnational courses on offer.

The ETUI ETUR and EWC learning pathways, as well as the Beckers EWC training case, suggests that trade union education at the EU level facilitates understanding of the economic, political and social environment/dynamics and actors' strategy/decision-making in the participants' home country and abroad. Ecologic concerns are covered through the pathways' reference to sustainability. Contexts which are both internal and external to companies as well as trade unions are possibly included in the previous points. However, what is internal and external to self is not mentioned explicitly. Knowledge on mobilisation theory would add value.

German trade unions surely enable their participants to understand the economic, political, social and ecologic environment/dynamics and actors' strategy/decision-making in Germany as well as Europe and around the world. Since Verdi and IGM advocate a critical-emancipatory approach to education and DGB BW teamer do likewise, it is probable that participants are encouraged to reflect critically on the behaviour of self and others and the respective contexts (internal/external). Also, connections between human behaviour and its outcomes do likely matter in the seminars. How far both commonalities and differences are discussed cannot be assessed.

Due to addressing the national, European and global levels, trade union education in Germany certainly attempts to adopt a deep/multi-level (vertical) view. Given the substantial variety of educational activities, the perspective is surely broad (horizontal), too. Facilitating participants to establish connections and understand the complexities of today is important to DGB BW, Verdi and IGM. Therefore, bridge-building between individual and collective concerns can be expected. Since the educational offerings cover history, current issues and deliberations about the future, it is furthermore likely that immediate/short-term and ongoing/long-term considerations are present. Since connected learning is seen as essential, hopefully the field of tension between individual/collective and short/long-term demands is likewise outlined. All three course programmes inspire participants to go beyond 'bread and butter' issues and connect local/national events with wider global struggles.

In addition, trade union education in Ireland develops course participants' analytic competence. However, since European and international contents are not officially part of the educational programmes – apart from equality and diversity courses and modules in the Certificate in Trade Union Studies – analytic competence remains rather bound to local and national concerns. We might, however, find course contents that facilitate transnational analysis in ICTU's special education for Global Solidarity Champions.

10.1.4.2. Creative/Imaginative

Both the ETUI ETUR and EWC learning pathways propose 'initiative and innovation' as a required skill. Innovative sounds the encouragement to link labour issues across levels, as this would be a feature of New Labour Internationalism (chapter 2). In both pathways, however, the links are supposed to finish in Europe instead of reaching further to the global trade union level. Likewise unclear is how utopian/boundless the imagination is which participants are encouraged to build regarding the worlds inside and outside labour. Trade union renewal is noted in the ETUR pathway but not in the pathway for EWCs. Whether both pathways lead to envisioning a new conception of man, life, education, work, civilisation and ecology, workers and the wider society as a 'community of fate' (chapter 2) seems difficult to tell. The word 'alternative' can be found in the ETUR pathway, but not in the EWCs'.

German trade unions try to stimulate participants' creativity and imagination. However, the extent to which this concerns the labour movement in terms of potential allies, contestation spaces, union types and strategies, new labour internationalism, etc. seems rather low. Whilst political education deals only exceptionally with topics that relate purely to trade unions, educational activities for representatives and activists concentrate on the corporate environment. How far labour and society are connected in the seminars in order to create an imagination of a cross-border/regional/global community, let alone a 'community of fate', is, hence, doubtful.

Nonetheless, participants are encouraged to think about social, economic, political and environmental alternatives. It is questionable, though, how radical these alternatives are. 'Think utopia, change reality' was a course in IGM political education in 2011. Since then, the word 'utopia' has never reoccurred in the programme. To the contrary, Verdi GPB used the word in 2005 for the first time, and it has featured in course titles again since 2010. DGB BW offered 'Utopia and capitalism - is the labour movement dead?' in 2002, but has not referred to utopia in terms of transnational issues since.

In Irish trade union education, very little can be found on creativity and imagination. Alternatives to neoliberalism and political decision-making are within the understanding of trade union education, but no course programme points to courses that deal with this topic.

Deeper analysis into the course work would be necessary in order to evaluate the extent to which theory is put into practice and whether alternatives to social and environmental issues are anticipated. Deeper data would also be needed to see whether innovative thinking is also encouraged in terms of allies, target constituency, contestation spaces, union types and strategies, the reorganisation of labour, New Labour Internationalism and other issues inside the Irish labour movement. Since European and global labour issues are only occasionally touched upon, Irish trade unions seem not to envision a cross-border/regional/global 'community of fate' of labour and societies.

10.1.4.3. Communicative

In the ETUI ETUR and EWC pathways, communication and interaction skills include active listening and information sharing. Facilitation of open and honest dialogue can, hence, be assumed. The Beckers case confirms that dialogue between the EWC members is stimulated. Since instinct and intuition are mentioned in regards to other skills, it seems doubtful that ETURs and EWC members learn to communicate with all six senses and in view of the four human elements. Negotiation is on the learning agenda, too. Both ETURs and EWC members are supported in improving their English and French. The latter is less in demand than English, though (chapter 6). The specialist terms relevant for talking to different target groups, such as European institutions, corporations, trade unions, union members, etc., are assumably caught up rather implicitly in the educational activities.

Communication, presentation and publication skills seem important to DGB BW, Verdi and IGM, especially for labour representatives and activists. However, the courses are usually in German. DGB BW did not offer a course in English or another language in 2015, but did so in previous years.¹⁹⁹ Verdi offered only one bilingual political education course (German/Turkish) this year. Activities in English have not been in the programme since 2013, and they were absent between 2007 and 2010. 'Polish for trade unionists and works/staff councils' (basic/advanced) was a once-off activity in 2006. Thus, DGB BW and Verdi limit transnational communicative competence to the German-speaking world.

IGM appears committed to providing English education only. The union has held a week of 'Business English for EWC/WC/General and Group WC', 'English Power Special' as well as 'English Refresher for (E)WCs' since 2010. Since 2013, a three-day course on 'English for works councils in international bodies' has been in place. Since 2012, technical staff can improve their English during a week's course. Participants who apply for 'International Project Management'

¹⁹⁹ A weekend of 'English for Trade Unionists' was available from 2010-14, where it was a week of 'English for works councilers' in 2009 and 2004. 2006 to 2008 saw a 2-week Spanish course for trade unionists. In 1997, a one-week course in English and French each was available for works councilers.

should speak at least one foreign language, preferably English. From 1999 to 2008, language courses were available where the language was not specified.

With English as their native language, Irish people have a great advantage in communicative competence, not only for talking to management globally and reading scientific studies, but also for transnational labour collaboration. Hence, trade union education in Ireland does not include any other language courses. However, we cannot expect Irish workers to communicate naturally in open and honest dialogues involving the four human elements and all six senses. Likewise, active listening and the language of different target groups at different levels must be learned. Therefore, the Irish natural communicative competence appears only restrictedly useful for improving transnational teamwork.

10.1.4.4. Functional

In both the ETUI ETUR and EWC learning pathways, research skills, reporting and information exchange are explicitly noted. Given the knowledge on actors proposed, cross-border networking seems encouraged vertically to different people inside the labour movement up to European level instead of globally. Whether contacts outside the labour movement are highlighted is difficult to evaluate. A closer look into the contents of ETUI educational activities could also reveal if knowledge on strong, weak and other ties is distributed.

The Beckers case indicates that the ability to build a team, network and develop a coordinated response to management is facilitated. Indeed, both pathways refer to people management through cross-cultural skills as well as team building and working. Project elaboration and management is covered, too. The ETUI core educational area Project Management includes education on EU funding (structural funds, health and safety). Given the supranational responsibilities of ETURs and EWC members, projects can be expected to be transnational.

Conflict management appears reserved for ETURs, where EWC members are encouraged to avoid them, but obviously to solve them once they have occurred. Both ETURs and EWC members shall be able to anticipate and manage changes, but they seem not facilitated much in bringing about change. Leadership skills are distinguished between collaborative (ETURs) and integrative/participative (EWCs), which are both team-oriented. Whether participants are encouraged to improve labour-internal-resources is uncertain, but it might come under the heading of initiative and innovation skills.

In Germany, functional competence in terms of labour representatives' and activists' roles in the company is, undoubtedly, core to DGB BW, Verdi and IGM. For DGB affiliates it appears, likewise, important to prepare representatives and activists as a bridge to the trade union. However, health and safety, conflict, people and project management, leadership, exploitation

of labour and social legislation, negotiation, IT application, organising, etc. are mostly seen in the national context. If applicable, European legislation may be included in seminars.

Explicit cross-border topics are rare in DGB BW and Verdi. The BW offered, in 2015, a week on 'Mental stress in European comparison' for works councils and two youth seminars concerning 'Strategies against racism in everyday life' and the 'Working group Internationalism'. The services union informs about 'Integration of migrants' and 'Agency and contract workers' which includes EU Directive 2008/104/EG.

IGM, to the contrary, seems to provide more transnational functional competence. In 2014 were introduced 10 yearly places for the 2.5 year traineeship in International Project Management as well as 3 days on 'Co-determination in international corporations'. Since 2012, participants can achieve two of three levels of the certified European Business Competence* Licence (EBC*L). Since 2010, participants can learn in 3 days how to optimise EWCs' practice. National EWC workshops have been offered since 1998, complemented by a yearly international EWC workshop in 2001. A week on European labour law was held in 2008, 2011 and from 2013 to today.

How participants are facilitated in researching relevant issues comprehensively and exchanging information, building and maintaining collaborative cross-border networks and improving suitable resources requires further information.

In Ireland, labour representatives are equipped with skills in negotiation, communication, project management, occupational first aid, personal effectiveness, effective meetings, conflict management, dealing with redundancies and grievances, etc., but not explicitly in transnational skills. Overseas trips can provide both participants and trade union staff who organised them the opportunity to network across borders. Staff in ICTU, SIPTU, IDEAS and Mandate may gain from participation in transnational projects. Staff in ICTU, Mandate and TEEU surely benefit from being involved in collaboration with the ETUI. TEEU, SIPTU, IBOA and PSEU aim at improving their project management skills through sending their education heads to the ETUI train the trainer course. All unions, in one way or another, are involved in managing affiliation to European and global unions and international social movements (Mandate). UNITE staff is involved, moreover, in collaboration with the Global Labour Institute (GLI).

10.1.4.5. Emotional

The ETUI enables ETURs and EWC members in adopting an open and flexible mind. It is not specified, though, whether openness for reforms or transformation is meant. How much participants overcome their fears, leave their comfort zones, break personal/organisational/structural barriers and are flexible in their behaviour is a matter of

how much they tap into the 'space of development'. The Beckers case indicates that participants can gain some confidence from ETUI educational activities, both individually as labour representatives and collectively as a body. Confidence, surely, is the first step toward leaving the comfort zone and breaking barriers.

Curiosity and comfortability to meet the unpredictable/unknown does not overtly appear on the ETUI pathways' list of attitudes. Arguably, acknowledging diversity, which ETURs and EWC members are encouraged to do, does not necessarily mean embracing it. The focus on enabling EWC members to avoid conflicts supports them neither in meeting the unknown, nor in becoming a courageous and confident risk taker and fighter. Pro-activity and the commitment to transnational labour solidarity appears facilitated through the attitude to share and delegate competencies, build Social Europe (ETURs) and a common transnational body (EWCs) as well as strengthen trade unions and the ETUC (ETURs) and ETUFs (EWCs). EWCs are, furthermore, stimulated to look for a common systematic approach from which to work on topics. The attitude to lifelong and mutual learning is not explicitly mentioned. Whilst tolerance and respect are certainly ingredients for constructive human relations – and both are part of the learning pathways – they point more to professional distance than to empathy and compassion for sisters and brothers.

Reference points in the German educational programmes which may be attached to emotional competence appear rather lopsided compared to the definition of emotional competence. A number of seminars seem to regard compassion to self, others and the environment and pay respect and empathy to others in terms of history, current circumstances and future plans. Verdi political education addresses the most extensive range of these issues, touching upon World War I and II, racism, migration, the European crisis' impact on peoples' lives, global hunger, fair trade, inhuman production conditions in China and Bangladesh and the sustainability of global resources. The DGB BW programme looks similar, but the courses are not as numerous.

IGM appears not to view worldwide climate change and the exploitation of natural resources as important enough to grant these problems distinct spaces in their educational programmes. Their compassion to self and others can be seen in activities on human working conditions, such as health and safety and work flow organisation. However, these activities concern the local German firm as opposed to global supply chains, for instance. Meanwhile, the metal workers have been consistently involved in intercultural training for roughly a decade.

Another point essential for transnational emotional competence is constructive commitment to transnational labour solidarity. A few indicative educational activities can be found in the DGB BW and Verdi IGM programmes.

For information on the remaining features which were defined to make up emotional competence (open for change, curious to meet the unpredictable/unknown, brave to take risks, self-confident to pro-act / a can-do attitude, ready to fight, appreciate continuous and mutual learning and de-learning), a deeper view into the course work would be necessary. It is yet possible, arguably, that participants can gain these attitudes from attendance of the educational activities. The question, nonetheless, remains whether trade unions aim to develop these attitudes deliberately or not.

In Irish trade union education, attitudes do not appear to be developed deliberately. Therefore, indicators for emotional competence are hard to find. Merely the courses and certificate modules which deal with equality and diversity seem to fall into this category. UNITE diverts a bit from the mainstream when they offer a course particularly on Black and Asian minorities. Inequality can also be expected as an element in the ICTU Global Solidarity Champion course. Yet, the question is how far these courses distribute knowledge and skills rather than address, overtly, the emotional side of injustices. The perception of injustice is essential to mobilisation (chapter 2).

Irish trade unions seem to believe that the provision of knowledge and skills is sufficient for developing people's emotional side, such as feeling more confident. Increased confidence to voice and debate interests is one aim of trade union education in Ireland. Global Solidarity Champion education as well as supporting projects in poorly developed countries builds the impression that solidarity is seen more in terms of the developing world than labour in the more developed countries.

10.1.4.6. Transformative

At a European level, the ideal of social justice and egalitarian democracy can be found in ETUR's knowledge of the European Union and its current (im)balance between democracy and markets. No reference is visible for EWC training. The value of justice seems absent in both pathways. This is not surprising given that knowledge on mobilisation theory and the importance of injustice are not covered. Human equity is touched upon through knowledge on equality as a special issue for ETURs and equal opportunity and social minimum standards (IFAs, OECD guidelines, etc.) for EWCs. Under the conditions that equality, equal opportunities and social minimum standards are theoretically installed and enforced in practice, these topics could contribute to transformative competence. It may empower workers' position vis á vis management and free employees from competing unfairly and unnecessarily against each other. Ecologic sustainability is a matter for both ETURs and EWCs. Whether participants are made aware that even sustainable growth must end at some stage remains questionable.

Whether participants are encouraged to liberate themselves from both oppressors and oppressed at all levels and emancipate towards humanisation and happiness seems fairly doubtful, too. As stated earlier, neither ETURs nor EWC members are facilitated in hooking up with international labour despite their knowledge on this level. Humanisation and emancipation are never noted. This does not surprise given that the ETUI's pedagogical approach of social constructivism would not include such radical vocabulary. Autonomy is mentioned, but only in terms of working skills. Suggesting that EWCs avoid conflicts would lead neither to emancipation nor critical consciousness.

Critical consciousness and wisdom can be developed through instinct and intuition, which can be detected among skills. The sixth sense seems, however, tied to research, analytical and assessing skills instead of a transferable skill for general decision-making. Moreover, the skill to utilise intuition deserves more attention than for just boosting transformative competence. Gaining wisdom would benefit, furthermore, from the attitude to lifelong learning as well as the knowledge and skills to become an independent learner. These points are absent in the two learning pathways. Furthermore, the ETUI's social constructivist approach to education appears unsuitable to develop critical consciousness. Needed is an approach based on the radical educational philosophy.

Questionable appears, also, whether ETURs and EWC members are fostered in rekindling the utopian vision of international solidarity and creating a spirit of transnational unity. The ETUI dreams of European labour being 'united in diversity', but it is not clear whether this dream extends beyond the continent. Trade union values are not specified in either pathway. A reference to 'imagined community' or 'community of fate' is, likewise, missing. Trade union renewal is a special knowledge issue for ETURs but is not anticipated for EWCs.

Additionally difficult to evaluate is whether ETURs and EWC members are supported in favouring more long-term (r)evolution than short-term gains. Equal opportunities, ecologic sustainability, social minimum standards, linking trade union levels, strengthening trade unions, ETUC and ETUFs as well as patience and resilience certainly point to long-term thinking. However, these are just a few areas in comparison to the numerous other items of the two learning pathways.

In Germany, Verdi appears a pioneer in educating in an ideology of worldwide democracy, social justice, human equity and ecologic sustainability. DGB BW does not offer any seminars on egalitarian democracy in political education other than a youth course-series to become a 'Betzavta-Trainer'²⁰⁰ and an activity on 'Role conduct, political opportunism and civil courage in democracy and dictatorship'. The word 'democracy' does not appear in the 2015 programme

²⁰⁰ Betzavta is a Hebrew word and means 'together, jointly'. The traineeship was developed by the ADAM-Institute in Jerusalem.

for works councils and other labour representatives except from a description of a seminar on leadership skills for works council chairs. A course on 'Human rights building in youth work and school' was held in 2007, but human rights have not featured in any other political education seminar title since. Nonetheless, the issue was present in 2015 through an activity on 'Slavery and forced labour in 21st century'. Again, 'human rights' are not at issue in the 2015 programme for works councils and other labour representatives. Between 2009 and 2014, political education on 'Global injustice' was offered. In addition to 'Global warming', a course called 'Oil, water and scarce soils' indicates a concern for ecologic sustainability.

For the first time, IGM decorated their 2015 programme with several quotes from the Universal Declaration of Human Rights (UDHR). Neither in the 2015 programme nor in the previous one do course titles or descriptions include human rights, though. Justice appears in relation to equal pay for women and, in general, evaluation systems at work and other working conditions in the local firm, but not in global terms. Democracy is, likewise, analysed regarding Germany. It seems, hence, that the metal workers' union educates participants in terms of social democracy, justice, human equity and ecologic sustainability more locally and nationally than beyond.

Another feature of transnational transformative competence is defined as (inner) wisdom and critical consciousness. To what extent wisdom is facilitated, for instance, through quotes from thought leaders and visionaries regarding meaning in and of life is not visible from the educational programmes. We know, however, that critical consciousness appears important to the services and metal union, since both Verdi and IGM subscribe to a critical-emancipatory approach to trade union education. DGB BW (2010) appears to have followed a social constructivist approach to education. The transformative value of the knowledge distributed so far appears, hence, fairly questionable. Official change towards critical pedagogy was agreed to at the DGB Educational Congress in January 2015. Thus, it remains to be seen whether DGB BW education will enhance transnational transformative competence more consistently in the future.

Regarding the utopian vision of international solidarity and creating a higher spirit of transnational unity, DGB BW has offered for educational leavers, since 2012, a week regarding labour solidarity in Europe. The view on trade union collaboration is, however, not extended beyond the continent, as opposed to in the two activities on international solidarity addressed to the young. Additionally, every year, young people of the Arbeitskreis Internationales (AKI) and other interested participants can meet the Master's students of the Global Labour University (GLU) to discuss global labour solidarity. Similarly, IGM youth is encouraged to 'think local, act globally'. Another youth seminar regards 'Solidarity – Back to the future', whereas 'Cooperation, solidarity and resistance' is open for all ages. A seminar called 'International

solidarity?!' took place in 2014. Although gaps remain, several courses offered by Verdi appear suitable for developing transnational transformative competence which match the TC framework remarkably well. The services union strikes for its utopian political education activity since 2007 concerning a non-hierarchical human society.

Another characteristic of transnational transformative competence is advocating more long-term (r)evolution than short-term gains. Arguably, all three trade unions work towards both more immediate and long-term changes. However, as argued regarding the creative-imaginative competence, it depends on how radical the food for thought distributed and evolving in the educational activities is whether transformations are achieved quickly or grow more organically.

Whether participants are facilitated to liberate themselves from both oppressors and oppressed at all levels and emancipate themselves towards humanisation and happiness is difficult to tell. Verdi and its utopia for a non-hierarchical society is, arguably, one step towards humanisation, as is the seminar 'Life quality - How do we treat our time?'. Since 2011, it views time in international comparison and might be a space to reflect on the increased speed and 'anytime-availability' that the more developed world has created to determine human life. Also, the three educational areas which GPB plans to include in the future programme – inequality (discrimination, racism, xenophobia), Europe between exclusion and inclusion (global justice, sustainability, access to resources) and fundamental social and human rights (social democracy, war and peace) – seem promising.

In Ireland, aspects of transformative competence are difficult to detect in the educational programmes. From the last ICTU (2013b) annual report, egalitarian democracy, social justice and human equity are indeed important to the Irish trade union movement. Ecologic sustainability, however, does not appear at issue. The ICTU annual report gives, furthermore, the impression that long-term gains are sought. The revolutionary potential of these aims is, however, fairly questionable since trade unions in Ireland are not committed officially to critical-emancipatory education. Corresponding to the voluntarist nature of industrial relations, it seems to depend on the willingness of the tutor how far participants are facilitated to question capitalist power structures and allegedly democratic institutions.

To what extent wisdom is shared and developed in the educational activities cannot be answered straightforwardly. Since trade union education in Ireland is perceived rather as a functional tool than as a philosophic debate, the amount of wisdom-building is probably insignificant. Trade union values might be trained on the course, even though the course title would not suggest this. Yet, the development of willingness to think, feel and act as a movement appears rather weak nationally and, even moreso, transnationally. Irish trade unions are in a phase of 'post social partnership restructuring' and perceive no resources left

for rekindling the utopian vision of international solidarity and creating a higher spirit of transnational unity. Likewise, higher aims like liberation from oppression and emancipation towards humanisation and happiness seem not on the agenda in view of the construction work necessary at the fundamentals of the movement.

10.2. Answer to the Research Question

With the TC profiles in mind, the question of to what extent trade union education in Germany, Ireland and at the EU level facilitates labour representatives' transnational competencies cannot be answered straightforwardly. Rather, the picture is mixed. The EU level and Germany touch upon all six sub-competencies, albeit to varying degrees (depths) and qualities (breadth, connected learning). Ireland seems an even more diffuse case because their educational programmes do not – with the exception of UNITE – have any transnational intent.

At the EU level as well as in Germany, analytic, functional and communicative competence appear the most addressed fields, although gaps and inconsistencies remain. Creative/imaginative competence is also covered in Brussels and Berlin, but loopholes are likewise present. Berlin's reach of imagination and creativity appears further than Brussels', yet both their understandings of creative/imaginative competence appear too short in reach and too weak in innovative power. The ETUI seems rather restricted to Europe, whilst German unions' go up to the global level. Within Germany, IGM seems to consider the world least, and concentrates majorly on Europe and national level. Both DGB BW and Verdi offer a number of courses on global issues. Verdi stands out for the furthest reach of imagination and creativity, as their courses include utopia and deliberations on human society.

Similar to the creative/imaginative competence, the transformative appears patchy. The ETUI refers to social democracy, human equity, and ecologic sustainability, but not to (in)justice. Again, their view of living these values goes possibly not beyond Europe. Verdi appears a pioneer in considering these values worldwide, and also DGB BW studies them in a global perspective. IGM relates them more to the local and national spheres.

Critical consciousness is probably not so much a result of trade union education at the EU level due to social constructivist pedagogy. To the contrary, critical consciousness appears important to German trade unions. Both Verdi and IGM subscribe to a critical-emancipatory approach to education, and DGB BW is on its way towards it. To what extent (inner) wisdom is facilitated is not evident from the educational programmes.

The ETUI concentrates on building solidarity in Europe. In Germany, the young trade union members are encouraged to think of solidarity globally, whereas the more mature ones are facilitated to stay on the continent.

Indicators of whether trade union education at the EU level and in Germany enables transformation in view of liberation from oppression are hard to find. The humanisation of both work and society is certainly an issue for ETUI, DGB BW and Verdi. IGM courses seem more concerned with humanising work than society. The question, however, remains whether humanisation is envisioned through and because of transnational collaboration, on the one hand, and inside or outside capitalism, on the other.

Of all transnational competencies, emotional competence appears lacking most and furthest away from its definition. The ETUI, DGB BW and Verdi seem to develop emotional competence not explicitly through their respective courses but, implicitly, over the days of an educational activity. Only IGM offers intercultural training for actives and multipliers. Given the centrality of emotions for mobilisation, (trans)national action and building an international labour culture, it is highly inappropriate for trade union education not to address the hearts of trade unionists directly. However, would trade unionists apply for courses that do some emotional work? Questionable appears, moreover, the suitability and range of emotions which trade union education at the EU level and in Germany try to develop. It remains doubtful whether participants become emotionally prepared for transformation instead of reforms – i.e., open and flexible to breaking all sorts of barriers (personal, organisational, structural), curious and comfortable to meet the unpredictable/unknown, brave and initiating (also in terms of conflict), etc.

In sum, trade union education at the EU level and in Germany focuses primarily on developing trade unionists' knowledge and skills, mind and body. The trade unionists' souls are addressed occasionally, whilst their hearts are left quite unattended. Thus, trade union education in Brussels and Berlin seems more to develop participants' 'sense of duty' and 'vested interest' than their 'sense of love' and 'sword of justice'. Yet, it is the latter from which (international) solidarity arises and maintains.

Irish trade union education seems to do likewise, but – except UNITE – not with the intent to improve transnational collaboration. Rather, Irish trade unions use education to enable labour representatives to deal with their roles and trade union members to enhance their employability. Therefore, apart from UNITE, trade unions' educational programmes do not include any activity on cross-border issues. Transnational contents do not go beyond courses and modules on equality and diversity, whereas the programme for Global Solidarity Champions is regarded rather as an adjunct to trade union education.

At the same time, being English natives, communicative competence comes naturally for Irish workers as a matter of their mother tongue. However, communicative competence includes more than just language proficiency and cannot be expected to naturally go beyond. Besides the lack of cross-cultural communication, no other languages are facilitated.

Creativeness and imagination is within the Irish understanding of trade union education in terms of alternatives to neoliberalism and political decision-making, but explicit course work on it is missing. Their engagement in transnational projects and travel may enhance functional competence. ICTU Global Solidarity with the developing world, which is potentially transformative, is a separate project and not integrated in the course work. Critical consciousness, which could also be transformative, might be rather the exception than the rule, because trade unions in Ireland are not committed officially to critical-emancipatory education.

Finally, as at EU level and in Germany, emotions are not purposely developed. Irish trade unions seem to assume that their members keep themselves motivated and ready for action. Motivation for European solidarity appears, however, not very developed, considering the low participation of Irish unions in the European Right2Water campaign and marching themselves ten days after the ETUC European Day for Action and Solidarity on 14 November 2012. At the same time, several Irish trade unions actively supported the national Right2Water campaign which was developed after the European one.

As a result, Irish trade unions would have to close much more and much wider gaps than those at EU level and in Germany for facilitating labour representatives' and members' transnational competence.

10.3. Implications of Transnational Competencies on Cross-border Labour Collaboration

Mobilisation theory tells us that labour collaborates across borders if workers in different countries share three perceptions: injustice, power and pace (chapter 2). Injustice is the necessary yet not necessarily sufficient trigger for action. The mere perception of injustice does not guarantee a move towards resolving it. Furthermore required may be the conviction of power to form a resolution. However, even if the perceptions of injustice and power are present, mobilisation can fail because the resolution of the injustice might take too long; that is, if all the efforts taken will not result in benefits that the actors can enjoy. Workers and their representations usually swing the 'sword of justice' on the grounds of a 'vested interest' (Flanders, 1970).

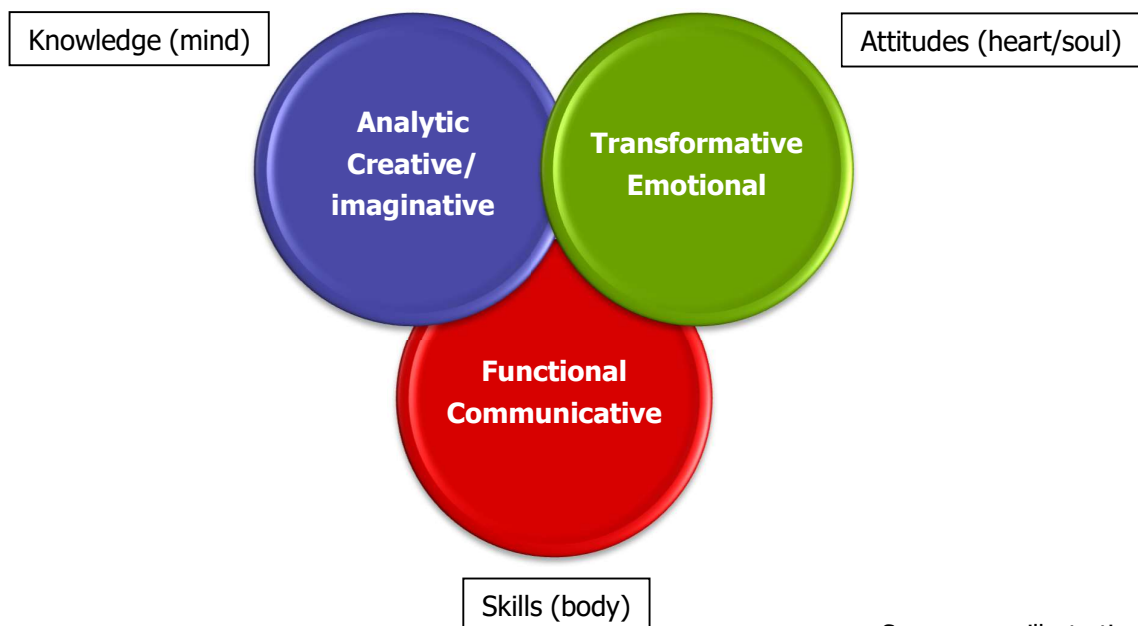
For mobilisation to happen, the perceptions of injustice, power and pace must arise in individuals who then seek to resolve unjust circumstances through collective action. From Sayer (2011), we learn that individual perceptions are the result of evaluation through the heart and mind, or the 'emotional reason'. The perception of injustice involves, moreover, values such as justice and equality, responsibility and respect, honesty and mutuality, etc., and the violation of these subjective ethics by another person or group. Thus, like Freire's

(1973, 2002) approach to critical pedagogy, mobilisation requires the interplay of heart, mind and soul (perception) in addition to the body (action) – i.e., all four human elements.

The extended concept of Transnational Competence (TC) supports transnational collaboration in that it embraces heart, mind, soul and body in the form of appropriate knowledge (Wissen - mind), attitudes (Wollen - heart/soul) and skills (Können - body) for cross-border mobilisation. Functional and communicative competence enables us to reveal information. Analytic competence makes sense of information from a critical perspective. Together with emotional competence, perceptions of power and pace can be created. Transformative competence is the domain of values and the desire to live up to these. As such, it provides reference points for injustices as well as further meanings for mobilisation. The trio of analytic, emotional and transformative competence, which involves mind, heart and soul, is the basis for building 'swords of justice'. Communicative competence facilitates labour to exchange information with (potential) allies across borders and deliberate about their 'swords of justice'. Creative/imaginative competence generates ideas for smart and innovative ways to fight with the 'sword of injustice' in view of resolving the injustices in the world of work as well as in regards to other political, social and ecologic concerns. Functional competence stands for action itself and develops the skills in sword combat, teamwork, leadership, etc.

Through the lens of knowledge, attitudes and skills the six transnational competencies can be viewed as follows (Figure 10-1):

Figure 10.3-1: **TC through the Lens of the Education Triangle**



Source: own illustration

From the three educational areas, trade union education in Germany, Ireland and at the EU level develop the heart and soul least and, hence, the desire to take (cross-border) action. Moreover, analytical competence largely outweighs creativity and imagination in terms of knowledge. Given this, the extended form of Transnational Competence supports transnational labour collaboration as it makes creativity and imagination as well as emotions and transformation explicit areas of learning. Transnational Competence also equilibrates the education triangle, on the one hand, because transformative competence strengthens attitudes and, hence, the desire to take transformative action. On the other hand, TC extends analytic capacities in view of innovative and alternative/utopian thinking.

Emotions have largely remained under-researched in social movement theory and are underrepresented in collective action, too (chapter 2). The neglect of the heart and soul in both academia and the labour movement is detrimental, though, because emotions and values are central not only to mobilising people but also building their sense of identity and solidarity. Hence, the education of emotions and values is far too important to subdue this to the development of knowledge and skills and to treat mobilising emotions and values as accidental results of trade union education or to assume them as a given which course participants bring to classes and grow themselves through outside educational activities. (Transnational) trade union education must develop the heart of every worker purposely – just as businesses utilise emotions – more precisely, people’s emotional deficits – as a marketing tool and sales instrument.

The emotional competence of TC may be a first step towards preparing the heart of every individual in the labour movement for transnational collaboration. Collective action is also the result of individuals who are motivated to work together by similar emotions about themselves and others. Emotions require specification and articulation to become real and repetition to grow. Therefore, this thesis not only makes a case for trade union education to provide space for emotional development but also points also to the importance of social movement theory and trade union education to focus more on understanding and developing the individual.

For so doing, too, the concept of Transnational Competence is enlarged by a sixth competence which goes beyond emotions and addresses the soul. Through the deliberate development of values and spirit, transformative competence provides a platform from which moral resources can be created. Thus, labour can grow a resource which only the small circle of social entrepreneurs appears to consider in terms of collective benefits beyond company walls. The meaning and support for action which workers can draw from their belief and confidence in higher aims and forces can be extremely powerful and mobilising. Since they can probably never compete with the material strength of capital, workers must gain their

power from the immaterial realm. Transnational transformative as well as emotional competence are means to access this.

10.4. In Search for Explanations

The reasons for the rather thin Transnational Competence profiles at the EU level, in Germany and in Ireland can – as part I notes – be found in structures, organisational behaviour and individual decision-making. Ultimately, however, structures and organisational behaviour are also results of human decision-making, be it as a single person or as a group. Therefore, with reference to choice theory (Glasser, 1998), this thesis highlights the role of the individual and everyone's freedom to choose without neglecting that certain powers internal and external to human beings influence their choices. Furthermore, part II provides an analytical framework that enables us to distinguish different types of trade union education.

Firstly, it depends on what meaning trade unionists attach to education for them. Is trade union education seen only functionally with the 'sense of duty' and 'vested interest' as a means to organisational capacity building? Or is trade union education equally seen ideologically with a 'sense of love' and the 'sword of justice' to fight for workers' emancipation and liberation from capital and the humanisation of man? Interest and ideology are not only the traditional essence of trade unions but also vital for building transnational labour solidarity (see chapter 2).

Modern trade unions seem to have lost their interest in ideology building. Companies' increasing anti-social behaviour underpinned by neoliberal governance keeps labour representatives busy on the ground, and tools need to be provided which enable them to utilise their (remaining) legal power. Arguably, especially because workers and their representatives are so much drawn to local, immediate and exhausting challenges, it seems all the more important to continuously remind them that there is a whole movement behind them. Brothers and sisters are fighting the same and similar battles in this country as around the world, and, through joint actions and support, labour has the potential to transform the destructive, necrophilic sides of economic and political activity into constructive, biophilic production processes and forms of life. This knowledge and feeling of community can give strength and purpose to persevere in difficult times. It also be the source for the desire to enhance the organisational capacity of trade unions. So, unions cannot afford their education to disrespect the hearts and souls of their members, neither for capacity building, nor for their mandate to humanise work and society.

The meaning of trade union education feeds, likewise, into the question of whether educational activities are supposed to moderate the current state of affairs or change it fundamentally (see chapter 3). Arguably, the mandate of trade unions is transformation

instead of mitigation. Transformation is facilitated only by radical educational philosophy and a critical-emancipatory pedagogy arising thereof. In short, trade unions which have set up education departments that follow the positivist, progressivist and humanist educational philosophy and collaborate with schools and universities, contradict their organisational and representative mandate as well as their proclaimed vision of social justice, democracy and the sustainability of nature. What the labour movement urgently requires to change social, political and economic systems fundamentally are members who actively strive to question the same.

However, not all trade unions in Europe seem to firmly follow the radical school of thought. Through social constructivism, trade union education at the EU level prepares the labour movement for mitigation. German trade unions officially commit to critical-emancipatory education. At the same time, they appear not to explicitly work on and with participants' emotions, even though putting people into emotional crisis is core to critical pedagogy. If course participants went home sad and broken, trade unions might fear that they would not come again. Leaving participants with a positive outlook and encouraging vision is certainly a challenge for tutors, especially since companies and politicians seem to more and more gain power to undermine labour.

Another aspect is trade unions' commitment to education. Union leaders who have integrated education firmly in the organisational strategy and consider it a priority, a part of their core business, are an exception. For most union leaders, education appears rather an unpopular, money-swallowing extremity of the organisation – unless it is paid by the employer or government.

German trade unions invest between 1.5% (Verdi) and 4.3% (IGM) of membership fees in their educational centres. Nominally, IGM invests three times more in their educational centres (€18.8 million) than Verdi (€6.2 million) and DGB BW (€5.9 million). For ICTU, education seems a part of their core business, since they invest 59% of affiliation fees in courses and educational staff (€1.5 million). SIPTU invests 3% of membership fees in courses and educational staff (€0.9 million) while IMPACT diverts 0.5% of membership fees for members' and staff training (€0.6 million).

Indeed, as proposed in chapter 3, resources are a major issue for trade unions. ETUI Education could expand its services and personnel if they had more funds available. Likewise, Irish trade unions complain about the lack in financial and human resources. German trade unions appear to have enough educational staff, but they could do with more money. Both DGB and Verdi have continuously reduced the number of educational centres. IGM seems not to be affected by a lack in resources. To the contrary, the metal workers just bought educational premises from DGB BW and hired a second full-time EWC professional. German

and Irish unionists refer occasionally to missing cultural resources, mainly collective identity. No reference to New Labour Internationalism has come up, though.

In addition to the unions' commitment to education in general, a decisive factor for the patchy attention to transnational competence is the national unions' commitment to education for transnational collaboration. In 2015, DGB BW counted 51 educational activities with transnational content, which is almost 21% of their total offer. Verdi offers about the same number (55), but this is nearly 12% of the overall programme. At IGM, half the amount of transnational courses (25) comprises 8% of their of their entire course range. The Irish confederation provides zero cross-border content, but 'Online Campaigning' takes place at DGB BW in Germany. IMPACT offers only one course for national workplace representatives. SIPTU, Mandate and TEEU have either a course or a certificate module on equality and diversity. In addition to such a course, four other UNITE courses can be termed transnational. Considering a total of 27 educational activities for UNITE members, the relation to the whole seems slightly bigger than at Verdi.

It follows that the personal commitment of trade union leaders, staff, members and tutors to trade union education and transnational courses appear a major factor that may foster and hamper its development (chapter 2). It is union leaders' decision how much money is invested in (transnational) trade union education, even if trade union members may ask otherwise. Trade union educational staff may propose to increase engagement in cross-border courses and initiate transnational educational projects, or stay silent. Educational staff may also be active (or inactive) in the field: for instance, by attending the annual ETUI Education Day and Conference and linking with GLI, ILO, IFWEA and trade union education staff in other countries around the world. Especially, colleagues in the global South might be helpful, since trade union members in these countries appear more connected to and comfortable with emotions.

Tutors might, likewise, attend transnational educational conferences and connect with partners abroad, provide examples of other countries in their courses, invite speakers from other countries, make a trip abroad depending on the location of the educational activity, suggest cross-border topics, give seminars in other countries to get transborder experience, be committed to critical pedagogy, etc. in order to make educational activities more transnational. Tutors can, however, also do as they have done so far.

Finally, it seems a matter of trade union members' commitment to lifelong and lifewide learning. At the EU level, in Germany and probably in Ireland too, the number of course participants is insignificant compared to the masses of trade union members. Even if it doubled, as Verdi GPB has demand, the amount of educationally active trade unionists would remain insignificant. The multiplier effect might compensate to some extent for the short amount of trade unionists committed to further education. Yet, it would undoubtedly create a

bigger movement in the movement as well as a feeling for international community, if – utopically – every trade union member was committed to regular attendance in trade union education. Eventually, trade union members need commitment to developing transnational personal and collective identity in order to enhance transnational collaboration.

One of the striking findings is that different trade unions in different countries have the same problems in terms of (transnational) trade union education. Hence, national and sectoral differences cannot explain unions' difficulties in the field. Instead, other factors are at play which unite trade unions in Germany, Ireland and at the EU level in their diversity. Arguably, attendance to transnational trade union education and its degree of suitability for fostering cross-border labour collaboration is a consequence of organisational and personal decisions. These decisions also include the (trans)national educational structures of trade union education which workers and their agents create, in particular the functional understanding of trade union education and the negligence of attitudes. This result underpins once more why a 'most-different' research design is appropriate for this thesis (see chapter 5).

10.5. Contributions and Limitations to Knowledge

The thesis contributes to the academic literature on (transnational) trade union education as it takes action on the previous findings regarding the role of education in successful transnational collective action. Several scholars have pointed out that education is decisive for labour to win its battles against global businesses. Given this, education is also vital for labour to revitalise. However, so far, none of these scholars has taken the step forward to analyse trade union education in terms of its potential and suitability for fostering joint cross-border activities, even though some of them have worked as tutors in the field. The thesis is a first contribution to pushing the field of trade union education further and putting this largely neglected field in the centre of the substantially researched area of trade union renewal.

Moreover, innovative is the attempt to take a holistic analytic perspective through a multi-level, multi-sectoral and cross-national research design in view of transformative changes particularly at an individual level. Transformation starts with everyone personally through their choices, yet every individual is influenced by the self, other people and Mother Earth, as well as the organisations and structures that human beings create. Education works on individuals and can, thus, be the trigger for transformative change and action in every aspect of life.

This thesis shows that education can have transformative power and trigger sustainable action towards the humanisation of the world of work and man only if the triangle of knowledge, attitudes and skills is balanced so that head, heart and hand complement each other. Knowledge and skills are important, as the unions in Ireland, Germany and at EU level suggest. However, for revitalising the respective national and European labour movement,

workers and their agents must go beyond that by emphasising attitudes and making them explicit areas of learning.

In fact, the original concept of Transnational Competence (TC) highlights that scholars in international management and political science should consider not only the head and hands vital for making a difference in cross-border collaboration but also the heart, as it included *emotional competence*. For enabling labour to make transformative differences, however, more educational space for the heart and soul is needed. The thesis contributes, therefore, to the academic literature on (transnational) trade union education by adding to the original concept of TC a sixth competence called '*transformative*'. Both emotions and spirit(uality), arguably, require attention to manoeuvring labour out of the cultural crisis into which they have moved themselves.

The contributions of the thesis are, however, constrained by certain limitations. On the one hand, the two surveys conducted are not representative. Their value for general conclusions is, therefore, rather small. On the other hand, the analysis bases itself largely on the trade unions' educational programmes and related documents. These documents do not, however, tell us anything about what happens in the classrooms. The non-participant observations of the critical ETUI Beckers EWC training case indicate consideration of this limitation, but more in-class observations are needed for arriving at stronger conclusions. As happened during the research period at the ETUI, however, course participants may deny access to observations. Certainly, tutors as well as union leaders may refuse researchers to analyse educational praxis.

At the same time, since trade union education has remained an under-researched terrain, the thesis' ambition is exploratory and aspires to determine what the field looks like rather than investigating a small spot of the field in depth. Therefore, the purpose of this thesis is more to elucidate the breadth of the field and provide direction for further and more detailed research.

10.6. Recommendations for Future Research

In order to enlarge the understanding of similarities and differences in (transnational) trade union education, further studies might compare trade union education in other countries in different industrial relations regimes in Europe, such as in Scandinavia, Southern and Eastern Europe, as well as on other continents of the world. Also interesting would be investigations into educational activities in a particular transnational sector, such as transport and textiles, in view of their attention to building transnational competencies. Such sectoral research could be complemented by ethnographic studies of specific cross-border campaigns like the Clean Clothes Campaign, the European Right2Water campaign, the ITUC Domestic Workers campaign, etc. in order to establish how transnational competencies actually enhance

transnational collaboration. To support the awareness and praxis of New Labour Internationalism (NLI), transnational competencies could be analysed regarding their impact on the *Power in Coalitions* between unions and community organisations across countries (see Tattersall, 2010).

Other studies could assess the suitability of certain concepts in view of boosting education in transnational competencies. Whereas 'emotional intelligence' (Ashkanasy, Dasborough, & Ascough, 2009; Goleman, 1996) appears fruitful for developing emotional competence, 'spiritual intelligence' (Wigglesworth, 2012a, 2012b) and 'ecospirituality' (Smith, 2009) seem promising for transformative competence.

10.7. Recommendations for the Educational Praxis

In educational praxis, emotions could be attended through educational activities which clarify basic labour concepts, such as solidarity, democracy, emancipation, (in)equality, (in)justice, etc., and connect them with the insights of mobilisation theory (see chapter 2). Most of all, a new understanding of solidarity must be developed on the basis of giving instead of gaining. Solidarity actions must be motivated by the question 'What can I give?' as opposed to 'What can I gain?' The gains will arise from the act of giving.

Like an initiation ritual into the labour community, an activity that clarifies the basic concepts of the labour movement could be made mandatory for new (and existing) trade union members. Some MNCs send their new recruits to training activities abroad, as an event to help them become familiar with company philosophy and meet colleagues from all over the world. Likewise, trade unions could do so in Europe. As we know from chapter 2, rituals are an important cultural resource and, therefore, vital to getting out of labour's cultural crisis.

Another ritual – i.e., one which attends to spirituality in trade union education – could be a meditation at the beginning and end of every educational activity. Chapter 2 showed that identity practices are required for building social identity with workers around the world. Social identity is the basis of solidarity and the means to create cognitive bonds with people who we not necessarily know personally. Thus, social identity is, most of all, an act of imagination. Like social identity, utopian thinking requires imagination, which is one aspect of transnational creative/imaginative competence. Arguably, meditation is perfect for developing our 'inner eye'. Moreover, mediation reduces stress and increases cognition. Meditating workers and their agents become more centred and, therefore, more confident to go into conflicts, if necessary. Most of all, mediation facilitates one becoming more compassionate to self, other and nature, which is a feature of transnational emotional competence.

In addition to these general recommendations for trade union education, the results of this thesis suggest that individual and collective coaching can complement trade unions'

educational activities. In particular, every EWC/SERB/SNB should be given a coach who accompanies the life of the representative body, acting as a mentor and motivator. The coach could do individual sessions with the members and collective sessions with the body. Coaching can also be a tool to improve (trans)national emotional competence, as it can boost confidence, reduce powerlessness and remove other emotional blockages that prevent supranational labour representatives from building transnational personal and collective identity as well as constructive commitment to cross-border collaboration.

Appendix

A. Field Work and Research Stays

ETUI, Brussels: 6 months (September 2013 - February 2014)

Germany: 3 months (July 2013, July 2014, April 2015)

B. Archives, Libraries and Databases that gave Access to Documents

UCD, Dublin: library

ETUI, Brussels: library, database

DGB Bildungswerk BUND, Hattingen: archives, database

Verdi, Berlin: archives

IG Metall, Frankfurt: archives

Friedrich-Ebert-Foundation, Bonn: library

SIPTU, Dublin: library

TEEU, Dublin: archives

C. Participant Observations

Workshop *Transnational industrial relations and the search for alternatives*, Greenwich University, 31 May-1 June 2012, Greenwich.

Industrial Relations in Europe Conference (IREC)/Industrial Relations Research Network of the European Sociological Association (ESA)/RN 17 Joint Conference, *Challenges for Public and Private Sector Industrial Relations and Unions in times of Crisis and Austerity*, 5-7 September 2012, ISCTE-Lisbon University Institute.

WSI Summer School, *Industrial Relations and crisis management in Germany: Lessons for Europe*, 17 - 21 September 2012, IG Metall Educational Centre Berlin-Pichelssee.

Critical Labour Studies Symposium, 2-3 March 2013, Ruskin College, Ruskin Hall, Oxford.

Right2Water campaign, public hearing at European Parliament, organised by the Committee on the Environment, Public Health and Food Safety (ENVI), 17 February 2014, Brussels.

International workshop *Labour and transnational action in times of crisis: from case studies to theory*, Centre of Advanced Studies (CAS), 27-28 February 2014, Oslo.

Global Solidarity Conference, *Global Crisis - Global Solidarity*, organised by LabourStart, 23-25 May 2014, Verdi headquarters Berlin.

IREC 2014, *The future of the European Social Model: New perspectives for industrial relations, social and employment policy in Europe?*, 10-12 September 2014, Eurofound Conference Centre, Dublin.

D. Non-participant Observations

Beckers EWC training, organised by ETUI, Hotel Progress, 9-11 December 2013, Brussels.

ETUC Annual EWC Conference, *What roles for European Works Councils?*, International Trade Union House, 24-25 October 2013, Brussels.

ETUI Education Day and Conference, *Time 4 Social EU - From austerity to democracy: a social contract for Europe* and *Train 4 Social EU*, organised by ETUI Education, 20-22 November 2013, Hotel Meliá Galgos, Madrid.

ETUI Education Department, monthly department meetings in October, November and December 2013.

ETUI Pedagogical Committee, bi-annual meetings organised by ETUI Education, October 2013 and February 2014.

European Economic and Social Committee (EESC), monthly meeting in November 2013 and February 2014, Brussels.

E. Interviews/Personal Conversations

Contact	Institution/ Organisation	Position	Level	Location	Date	Formal/ Informal
Anbuhl, Matthias	DGB	Head of Department Education and Qualification Policy	Germany	Berlin	15 Apr 2015	Formal
Andersson, Hans-Erik 'Simon'	Runö School	Senior Trainer	Sweden	email	17 Feb 2015	Formal
Bosnjakovic, Mujo	Becker	EWC Member	Sweden	Brussels	9-11 Dec 2013	Informal
Callinan, Kevin	IMPACT	Head of Education and Training	Ireland	Dublin	15 Apr 2015	Formal
Caraj, Marie	ETUI	Education Officer, Special Themes and ETUF taken over from Le Douaron	EU	Brussels	4 Dec 2013	Formal
Demaitre, Bruno	ETUI	Education Officer, ECW/SERB/SNB	EU	Brussels	27 Sep 2013, 20 Feb 2014, emails 20 June, 11/12 August 2014	Informal
Dubois, Mardjan	Unionen	EWC Coordinator	Sweden	Brussels	9-11 Dec 2013	Informal
Dumitrescu, Valerica	ETUI	Education Officer, Young Trade Union Leaders	EU	Brussels	ongoing between Sep and Nov 2013	Informal
Gallagher, Martin	CPSU	CPSU Member, ICTU Global Solidarity Champion	Ireland	Dublin	24 November 2012	Informal
Gallin, Dan	GLI	Chair GLI, former General Secretary of the International Union of Food and Allied Workers (IUF)	International	Berlin	24 May 2014, email 28 Feb 2015	Formal
Garrido, Ulisses	ETUI	Director Education Department	EU	Brussels	ongoing between Sep 2013 and Feb 2014, email 19, 26 and 30 Aug 2015	Informal

Gehrke, Bernd	DGB Bildungswerk BUND	Freelance Trainer DGB; Member of Verdi working group 'History of East/West Social Movements Berlin'	Germany	tel	13 Apr 2015	Formal
Glawe, Heiko	DGB	Managing Director Berlin Region	Germany	Berlin	25 May 2014	Informal
Gray, Dave	Becker	EWC Chair	UK	Brussels	27 Jan, 5 Feb 2014	Formal
Hauck, Margit	Verdi	Verdi b+b Managing Director Federal Level	Germany	Berlin	26 Mar 2015 tel	Formal
Heading, Sean	TEEU	ETOS Manager	Ireland	Dublin	27 March 2015	Formal
Hoffmann, Aline	ETUI	Head of Research Department/Unit 1: Europeanisation of Industrial Relations EWPPC: European Workers' Participation Competence Centre	EU	Brussels	29 Nov 2013	Informal
Jagodziński, Romuald	ETUI	Researcher Unit 1	EU	Brussels	1 Nov 2013	Informal
Junno, Leo	TJS Study Centre	Educational Coordinator	Finland	email	17 Feb 2015	Formal
Kehrbaum, Thomas	IG Metall	Head of International Trade Union Education	Germany	Frankfurt	23 Feb 2015 tel	Formal
Kelly, Ron	IDEAS	General Manager	Ireland	Dublin	4 June 2015	Formal
Kennedy, Jean	SIPTU	PA to the Head of SIPTU College	Ireland	Dublin	12 June 2015	Informal
Kubik, Manfred	DGB Bildungswerk BUND	Forum Political Education - Head of Adult Education/Educational Leave	Germany	Hattingen	31 Mar 2015 tel 21 + 23 Apr 2015 f2f	Formal
Le Douaron, Jean-Claude	ETUI	Education Officer, EWC + ETUF, retired Sep 2013	EU	Brussels	21 Nov 2014, email 17 Feb 2015	Formal
Linder, Dirk	IG Metall	Siemens General Works Council Member	Germany	Greenwich	1 June 2012	Informal
Lundén, Ari-Pekka	SAK Kiljavan opisto	Representative of Education Foundation	Finland	email	24 + 27 Feb 2015	Formal
O'Rourke, Margie	Mandate	Assistant to Morrissey, Training Administrator	Ireland	Dublin	28 March 2015	Informal

Melin, Sanna	LO-S	ETUI Pedagogical Committee Member	Sweden	email	18-20 Feb 2015	Formal
Meyer, Claudia	DGB Bildungswerk BUND	Executive Director	Germany	Düsseldorf	13 Feb 2015	Formal
Michelbrink, Andreas	Verdi	Executive Director GPB gGmbH	Germany	Berlin	2 + 10 Mar 2015 tel 10 + 14 Apr 2015 f2f	Formal
Moctonian, Anton	Unite	National Trainer/EWC Expert	Ireland	tel	21 Apr 2015	Formal
Morrissey, Aileen	Mandate	National Coordinator of Training and Development	Ireland	Dublin	28 March 2015	Formal
Munch Kofoed, Niels	LO-School	Senior Consultant	Denmark	email	17 Feb, 13 April 2015	Formal
Nolan, Brian	TEEU	National Construction Official	Ireland	Dublin	27 March 2015	Informal
Nolan, Margaret	ICTU	ICTU Head of Learning until 2002, now Freelance Trainer for Mandate and INMO	Ireland	tel	16 June 2015	Formal
O'Brien, Mags	SIPTU	SIPTU Senior Trainer, ICTU Chairperson Global Solidarity Committee, Chair Trade Union Friends of Palestine (TUPP)	Ireland	Dublin	3 June 2015	Formal
Peplowski, Günter	Becker	EWC Member	Germany	Brussels	10-11 Dec 2013	Informal
Portela, Gabriela	ETUI	Education Officer, Languages & Communication, Pedagogy, Train the Trainer	EU	Brussels	8 Nov 2013, 21 Feb 2014	Formal
Radman, Ljuba	ETUI	Administrative Assistant Education Department	EU	Brussels	5 Feb 2014	Informal
Rößler, Holger	IG Metall	Ressort Works Constitution and Co-determination, EWC Coordinator	Germany	Frankfurt	6 Mar 2015 tel 28 Apr 2015 f2f	Formal
Sanchez, Pablo	EPSU	Policy Staff - Communication, Public Relations, Liaison with the European Parliament, Youth	EU	Brussels	29 Jan 2014	Formal
Siebens, Frank	Verdi	Co-determination Expert, EWC Coordinator	Germany	Berlin	16 Apr 2015	Formal

Tilling, Cristina	ETF	Political Secretary / Road Transport, EWCs, Gender Equality	EU	Brussels	14 Feb 2014	Informal
van den Berge, Jerry	EPSU	Policy Staff - European Works Councils, Water, Waste	EU	Brussels	19 Feb 2014	Formal
Vaughn, Frank	ICTU	Head of Learning	Ireland	Brussels Dublin	10 Oct 2013, 24 Mar 2015	Formal
Weber, Daniel	DGB Bildungswerk BUND	Trainer Head of Competence Centre Labour Market and Occupational Integration Head of Intercultural Competence Centre	Germany	tel	2 Apr 2015	Formal
Wittich, Bernd	DGB Bildungswerk BUND	Freelance Trainer for DGB Bildungswerk	Germany	Hattingen	23 Apr 2015	Informal

f2f = face to face; tel = telephone call

F. Methodological Note on the ETUI Madrid Survey

The ETUI Madrid survey is an amalgamation of the two previous ones made for the same event, which is the ETUI Education Day/Conference, in 2009 (Lisbon) and 2012 (Zagreb).²⁰¹ Some questions have remained whereas others were omitted because of their unsuitability. In addition, some questions were reformulated or consolidated while others were added. 14 questions were new or newly formulated. The author compiled the following document:

²⁰¹ While the former (2009) was apparently prepared by the previous ETUI Education Director, Georges Schnell, the latter (2012) was done by a previous intern of the Education Department.

ETUI Education Day/Conference

20 – 22 November 2013, Madrid (Spain)

'Time and Train 4 Social EU'

Dear Colleagues,

Welcome to our annual Education event.

The ETUI Education Department would appreciate your help. We would like to know more about your organisation, your opinion about our services as well as you as a person in order to better meet your and your organisation's needs regarding trade union education. Your opinion is therefore very important to us!

Would you be so kind to take ca. 15 minutes for answering some questions for us? If so, please be honest – there is no 'right' or 'wrong'. Moreover, your answers will remain anonymous of course. If there is a question which does not apply to you, please tick or write n/a = 'not applicable'. Are you curious about the results? We will share them with you.

If possible, please answer online here:
https://docs.google.com/forms/d/1_mp4Uj8LN437ekf5POayqQc-m9BET6oyN_ErnA53Wq8/viewform

YOUR ORGANISATION

1. What is the **name** of your organisation?
2. At which **level** is your organisation active? National European Global Other
3. Which **country** is your organisation from? n/a
4. How does your organisation mainly provide **education**?
Own education centre Other trade union education centre Other service provider
5. What is the name of the other trade union education centre(s) or service provider(s) your organisation may **collaborate** with?

TU education centre(s):	Other providers:

n/a

OUR SERVICES

6. How do you mainly get to **know** about our activities?
Email Online search ETUI website Word of mouth Other
If other, please specify:
7. Who mainly **informs** you about our activities? ETUI My organisation I myself Other
If other, please specify:

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8. What ETUI course(s) have you personally **participated** in already? Please tick all that apply.

EWC/SE <input type="checkbox"/>	Young trade union leaders <input type="checkbox"/>	Languages <input type="checkbox"/>	Project Management <input type="checkbox"/>	Eurotrainer <input type="checkbox"/>	Other <input type="checkbox"/>	None <input type="checkbox"/>
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If other, please specify:

9. How **satisfied** were you with the quality of our course(s)?

	EWC/SE	Young trade union leaders	Languages	Project Management	Eurotrainer	Other	n/a
😊	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
🙂	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
😐	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
😞	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
😡	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

10. How can we **increase** the quality of our courses?

11. How **useful** was the course content to you?

	EWC/SE	Young trade union leaders	Languages	Project Management	Eurotrainer	Other	n/a
Very	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Some	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Little	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Not at all	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

12. How can we **increase** the usefulness of our courses? Please consider the perspective from you as a (potential) participant and your organisation.

Participant:	Organisation:
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13. When was the **last time** you participated in one of our courses?

2013 2012 2011 2010 2009 Earlier Never

14. How can we improve the **visibility** of our activities?

15. How could you **help us** improve the visibility of our activities?

16. What **topics/activities** do you consider essential for enhancing union officials' and worker representatives' capacity to **work together across countries**?

17. What **topics/activities** would you personally and your organisation need us to offer in the **future**? Please put numbers (1. ..., 2. ..., 3. ...) to rate your answers according to importance.

You:	Organisation:

18. What other **comments/suggestions** do you have for us?

PERSONAL DETAILS

19. What is your **role** in your organisation?

Head of (Con)federation or equivalent <input type="checkbox"/>	Head of Education Dept <input type="checkbox"/>	Head of European or International Dept <input type="checkbox"/>	Trade Union Official/Workers' Representative <input type="checkbox"/>	Trainer <input type="checkbox"/>
Head of (Con)f. or equivalent + Trainer <input type="checkbox"/>	Head of Education Dept + Trainer <input type="checkbox"/>	Head of Europ./Int. Dept + Trainer <input type="checkbox"/>	Trade Union Official/Workers' Rep. + Trainer <input type="checkbox"/>	Other <input type="checkbox"/>

If other, please specify:

20. **How many** times have you attended our Education Day/Conference before?

5+ 4 3 2 1 0

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21. **Why** do you attend this education event? Please give your 3 main reasons.

1.
2.
3.

22. Who **initiated** your participation in this event?

My organisation I myself We both Other

If other, please specify:

23. What is your **gender**? Female Male

24. What is your **age**?

up to 25 26 – 35 36 – 45 46 – 55 56 – 65 66+

25. What is your highest **education degree**?

Secondary Apprenticeship Bachelor Master Doctorate Other

If other, please specify:

26. Which area **related** to trade union education does your educational background include? Please tick all that apply.

Labour Relations/ Industrial Relations <input type="checkbox"/>	European/ International Relations <input type="checkbox"/>	Pedagogy/ Education Sciences <input type="checkbox"/>	Sociology <input type="checkbox"/>	Political Sciences <input type="checkbox"/>	Human Resources <input type="checkbox"/>	None <input type="checkbox"/>	Other <input type="checkbox"/>
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If other, please specify:

27. Are you member of the **ETUI Pedagogical Committee**? Yes No

28. Which **ETUI education network(s)** are you member of? Please tick all that apply.

- Eurotrainers
 Language Tutors
 Project Management Network
 N.E.T. – Network of EWC Trainers
 NETYL – Network for European Training of Young Trade Union Leaders
 Trade Union Training Centres Network
 None

Thank you very much for your time!
Enjoy the event.

Ulisses Garrido, ETUI Education Director
 Bianca Föhrer, Intern Education Department

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Compared to the previous two ETUI surveys, the author improved the survey structure. Now the questions clearly relate to three groups of information: the conference participant, the organisation s/he is from as well as his/her opinion about the Education Department's services. The sequence of questions was rearranged too. The survey started hence with some warm-up queries on the organisation followed by the more challenging questions about the ETUI services. To cool down, personal statistical data was asked rather towards the end. The new structure was built in an attempt to create a more meaningful line of inquiry on the one hand. On the other, it aimed at keeping the participants' attention. This was also aspired through mixing the types of questions, if possible.

a) Sample Characteristics

The total sample was composed of 36 conference participants from the European South (47%), 18 from the Centre-East (24%), 8 from the North (11%), 6 from the Centre-West (8%), and 7 from the Isles of Britain, Cyprus and Ireland (9%). In addition, there was one member of the European Economic and Social Committee (EESC) based in Brussels (1%) (Table C-3). This classification of regions draws on Visser's earlier mentioned 'industrial relations regimes' (European Commission, 2009, 2013) and its application by Vandaele (2011: 15).²⁰²

Since 42 of the conference participants took part in the survey, the response rate is 55%. Least responses came from the North (38%) whilst most from the Centre-West (67%) and Centre-East (67%) region took the opportunity to put forward their opinion. Considerable participation stems also from the West (56%) and South (53%) (Table C-3).

²⁰² Turkey is neither classified in the European Industrial Relations Report (European Commission, 2013) nor in Vandaele (2011) since this country is still not a EU member. It was joined to the 'South' because Turkish industrial relations appear more state-centred like in France, Italy, Portugal and Spain rather than the quite liberal 'Anglo-Irish' systems. Extremely restrictive anti-trade union laws which the military dictatorship adopted in the early 1980s are still in place. We may therefore not assign to the Turkish government the more 'voluntarist' role which would be characteristic for more liberal industrial relations regimes. Likewise, Greece, Portugal and Spain have a dictatorship history. Furthermore typical for Turkey is the trade unions' split along political pro and contra communist lines. Such divergence is however not typical for more liberal industrial relations regimes.

Table C-3: **Sample Composition and Response Rates Based on the Five Industrial Relations Regime Areas in Europe (Vandaele 2011)**

IR Regime	Sample Size		Number of Respondents		Response Rate
<i>Centre-East</i>	18	24%	12	29%	67%
<i>Centre-West</i>	6	8%	4	10%	67%
<i>North</i>	8	11%	3	7%	38%
<i>South</i>	36	47%	18	43%	50%
<i>Isles</i>	7	9%	5	12%	71%
<i>- Brussels (EU) -</i>	1	1%	0	0%	0%
Total	76	100%	42	100%	55%

Source: own illustration;
 Centre-East (Bulgaria, Hungary, Latvia, Lithuania, Montenegro, Poland, Romania, Slovak Republic);
 Centre-West (Austria, Belgium, Germany);
 North (Denmark, Finland);
 South (France, Italy, Portugal, Spain, Turkey);
 Isles (Cyprus, Ireland, UK)

The fluctuating participation rates indicate that the group of survey participants does not represent the composition of the total sample. Besides the absence of the European voice from Brussels, the Northern view is therefore substantially underrepresented. Likewise, the perceptions of the South are underrepresented, yet only little. Notably overrepresented are in contrast the results from the Centre-East and Centre-West. The opinions of the Isles are overrepresented too but still balanced best (Table C-3).

The survey participants were composed of 40% females and 60% males. Their age ranged between 26 and 65. Those aged above 46 accounted for somewhat more than half (56%). Most of the panel were between 46 and 55 (31%). The group of up to 35 was least present (21%).

Representants from the host country of the event accounted for the majority: 21% come from a Spanish trade union. 7% each represent a French, Hungarian, Italian or Portuguese union. 5% each stem from an organisation in Belgium, Finland, Lithuania, Poland or the UK. 2% each work for a trade union in Austria, Bulgaria, Cyprus, Denmark, Germany, Ireland, Latvia, Montenegro, Slovak Republic, Romania and Turkey. Representatives from a trade union in Estonia, Greece, Malta and Sweden did not participate in the survey.

The level of education appears quite high: 93% graduated from university. Slightly more than half of them obtained a Master degree (55%), while around a fourth (24%) still has the opportunity to move on from Bachelor level. Some few (14%) completed even a doctorate.

The area(s) of their studies can be connected almost always to trade union education. Only 6% stated that their degree does not relate to it. Labour Relations/Industrial Relations account for a fourth (25%) and is closely followed by Pedagogy/Educational Sciences (20%). Political

Sciences (13%) and European/International Relations (11%) are less prominent. Human Resources (6%) and Sociology (4%) make up the rear. Other areas (13%) include Industrial Management, Business and Economics, Informatics, Project Management, Medicine (Physiology/Occupational Safety) and History. Economics was mentioned by four and Project Management by two persons while the other areas are covered by one each. The vast majority can draw back on either one (24%) or two (45%) of the abovementioned fields of study.

Regarding their organisational roles, almost half of the survey participants (43%) are Head of Education Department. A third of these leaders is also trainer (33%). 12% are Head of the European or International Department yet none of them give trainings. Adding a Head of Research and another of Project Management as well as one Trade Union Institute Director, nearly two thirds of all respondents belong thus to union management (62%). In contrast, workers' representatives from rank and file level are largely absent (7%). At the same time, union staff in the position of Project Manager, Training Coordinator, Social Policy Advisor, Secretary or Administrator account for almost a fifth (19%). In total, a third of all respondents (33%) are active trainers.

The last time these trainers as well as the other survey participants changed hats and took the role of student is quite recent. For 36%, this was in 2013. 21% took a course in 2012. In other words, more than half (57%) participated in an ETUI course during the last 2 years. Between 2009 and 2011, probably the bottom years of the ongoing crisis in Europe and therefore arguably the best time for education, personal development activity experienced a gap. Only 7% took a course during these three years, thereof none in 2010 but 5% in 2011 and 2% in 2009. For some 12%, the personal experience with ETUI courses dates back before 2009. A considerable group of 24% has never pursued an ETUI training offer so far.

Concerning the type of courses attended, the majority (24%) took courses outside the five ETUI core training areas. These more peripheral topics concern funding (12%), migration (9%), budget lines (7%) as well as lobbying, social dialogue, the Scenario Method and trade union renewal (5% each). Less visited (2% each) were courses on 'how to exit the crisis and overcome its impact?', the Lisbon Strategy, EU2020, Lisbon Treaty, TRACE, organising, nationalism, populism, austerity measures kit preparation, collective negotiation and inequality. Within the ETUI core training areas, i.e. EWC/SE, Young trade union leaders, Languages and Communication, Project Management and Eurotrainers, participation in Project Management has been highest with 20%. This is followed by Eurotrainers (17%) and Languages (12%). Young trade union leaders (7%) and European Works Council/European Company training (5%) has been attended the least as of yet. A considerable group of 11 participants have not taken any course at all so far (26%).

The main source through which the respondents get to know about ETUI activities is email (74%). These emails obviously stem mostly directly from the Education Department since 77% state that it is ETUI who informs them about their activities. Only 19% are informed through their (union) organisation while almost nobody (2%) pro-actively searches for information on European education activities. As a result, the information flow appears predominantly like a one-way street from the ETUI to the organisations. The organisations seem not always to forward information to their personnel and other organisational members.

Correspondingly, online search machines (2%) and the ETUI website (5%) are rarely visited. Likewise seldom seem representatives to talk about the ETUI inside their organisations since 'word of mouth' accounts for only 2%. Other responses take a notable space of 16%. These include "historical engagement", "active cooperation with the ETUI", mentioning the own organisation respectively a particular contact person in there, or working groups and networks.

Apart from three survey participants (7%), the remainder is not part of the ETUI Pedagogical Committee (93%). Likewise, the majority of 59% is not member of any ETUI Education network. Among the survey participants were ten Eurotrainers (22%) and four members of the Training Centres Network (9%). Three respondents are part of the Young Trade Union Leaders network (6%) while one represented the networks of Project Management and European Works Councils each (2%). None of the Language Tutors took the survey.

b) Organisational Characteristics

The survey participants are employed by 31 national union confederations in 21 countries in Europe. This accounts for 36% of all ETUC members. Another survey participant works for SOLIDAR, a European network of non-governmental organisations (NGOs) based in Brussels which aims at promoting social justice around the world. The total number of surveyed organisations is hence 32. Drawing back on the abovementioned classification of IR regimes, most of them, namely 11, are located in the Centre-East (34%). Almost as much, i.e. 10, are based in the South (31%). Basically two thirds of organisations (65%) can be found in the European East and South. Other organisations are situated in the Centre-West as well as on the Isles of Ireland, Britain and Cyprus (13% each). Least unions are in the North (9%) (Table C-4).

Table C-4: **Distribution of Organisations Based on Their National Industrial Relations Regime (Vandaele 2011)**

IR Regime	Number of Organisations	In %
<i>Centre-East</i>	11	34%
<i>Centre-West</i>	4	13%
<i>North</i>	3	9%
<i>South</i>	10	31%
<i>Isles</i>	4	13%
Total	32	100%

Source: own illustration;
 Centre-East (Bulgaria, Hungary, Latvia, Lithuania, Montenegro, Poland, Romania, Slovak Republic);
 Centre-West (Austria, Belgium, Germany);
 North (Denmark, Finland);
 South (France, Italy, Portugal, Spain, Turkey);
 Isles (Cyprus, Ireland, UK)

As indicated earlier, interesting results stem from the question *"at which level is your organisation active"*.

All surveyed trade unions are national confederations and are hence active at national level. Some representatives however suggest that the organisational level of action has gone beyond national borders. The representative from the Hungarian SZEF perceives that his union is active at European level. The representative from the French CFTC, one from their national colleagues at CFDT as well as the Slovak official from KOZ SR even contend that their respective union is active globally. One representant from the Spanish CCOO could obviously not identify with any of the answers given and puts forward an "other" level.

In terms of education provision, more than half of organisations use their own training centre (58%). Basically a fourth (24%) draws back on other trade union education centres while slightly less (18%) collaborate with other service providers (Table C-5). It follows that trade union education is provided at 82% within the labour movement while 18% is delivered by external co-operators. The results might lead to assume that collaboration is rather sought inside than outside the movement.

Table C-5: **Distribution of education provision across the five industrial relation regimes in Europe**

IR Regime	Own Centre		Other TU		Other SP		Total
<i>Centre-East</i>	7	64%	2	18%	2	18%	11
<i>Centre-West</i>	1	25%	1	25%	2	50%	4
<i>North</i>	1	33%	2	67%	0	0%	3
<i>South</i>	9	75%	2	17%	1	8%	12
<i>Isles</i>	1	33%	1	33%	1	33%	3
Total	19	58%	8	24%	6	18%	33

Source: own illustration; TU = trade union, SP = service provider

Regarding the distinctions in Europe, it appears difficult to find a pattern in terms of education provision due to the non-representativeness of the survey. The results nevertheless indicate that trade unions in the Centre-East and South rely to a vast extent on their own education facilities.

In Scandinavia, the provision of labour education seems rather the responsibility of the respective confederation affiliates. Despite not represented in table C-5, the Swedish LO has its own Runö Education and Development Centre. They also collaborate with Bommersvik college and conference centre owned by another trade union and at least one other service provider, namely the Olof Palme International Centre.

Outsourced to Colleges of Further Education is trade union education in the UK. The Irish Congress uses mostly "various affiliate centres" whilst the Cypriot SEK has its own education centre. The situation on the Isles seems hence not so straightforward and needed further research.

Likewise unclear appears the trend in providing labour education in the Centre-West. Reducing the results by the NGO SOLIDAR in Belgium which uses other service providers, the picture is equally spread as on the Isles.

c) Limitations

The survey participants were encouraged to give honest answers since there is no 'right' or 'wrong'. They were furthermore ensured that their answers will remain anonymous. Since every conference participant was given the presence list with names, organisations and email addresses as part of their event document package, it can however not be guaranteed that answers may not be traceable to their owners.

Considering the imbalances among the sample, it becomes evident that the survey is non-representative. Neither was the composition of conference participants representative of all 85 national union confederations in 36 countries which are currently member of the ETUC, nor

was the composition representative of the trade union education world in Europe.²⁰³ Delegates from the ETUC member organisations in Andorra, Croatia, Iceland, Liechtenstein, Luxembourg, Macedonia, Monaco, Netherlands, Norway, San Marino, Serbia, Slovenia, and Switzerland were missing in Madrid. Despite not a member of the ETUC and politically still considerably influenced by communist Russia, yet geographically situated in Europe, delegates from Belarus, Ukraine and Moldova were also absent. It seems, however, that people from these latter three countries were not invited. In short, the survey panel lacks representative character in several respects and therefore constraints the possibility to generalise results.

Moreover, the panel is not pure in terms of national trade union confederations since it includes also three representatives from other kinds of organisations (labour affiliated folk-high school; non-governmental organisation) respectively institutions (EESC). Since staff from these organisations/institutions are not the typical service users of the ETUI, if at all, the results may be blurred. Distortion may concern particularly those outcomes regarding the service users' needs. However, the extent of 'impurity' in the panel is rather limited (4%). This amount is even decreased to 2% when we consider the group of those who took the survey indeed. It can therefore be assumed that the impurity in the panel has not impacted statistically significantly on the survey results in view of national union needs.

Another limitation to the survey is that the author had had no previous experience in survey conducting nor in working with Google Drive. She decided for this means as a matter of time and the immediate availability through her personal email account. In comparison to SurveyMonkey and other free online tools, Google Drive appears a rather quick and easy way to create surveys and does hence not require much resource investment to utilise it. The data collection and presentation seems conversely not as sophisticated as in assumably other survey creation tools, let alone paid ones probably. Therefore, whether due to human or technical mistake, four data sets have become missing in the Excel table which Google created to collect the data. This concerns the Belgian ACV, the Polish FZZ, one from the British TUC as well as one from USSCG Montenegro. Nevertheless, the summary of results which Google prepared from this Excel sheet includes all responses.

While the Google summary document counts 43 responses, in reality, it is 42. The conference participant from Montenegro took the survey twice with the author's approval. The author assumed that by deleting a row in the related Excel sheet, the summary of results would change accordingly. This is however a fallacy. Deleting a row in the Excel data sheet does evidently not affect Google's presentation of results.

Since the double data set is among those lost, the loss has in fact acted as a correction. It ironed out one of the flaws in results which has arisen due to the author's inexperience. In an

²⁰³ Amongst others, the ETUI is bound to ETUC policies.

attempt to undo her mistakes as much as possible, she corrected the double data entry manually by recalculating the quantitative results. Qualitatively, correction was made too when possible.

Other shortcomings may have resulted from being 'lost in translation' sometimes. Where professional translators were available to the author through ETUI for preparing it, she had to deal with the answers in French and Spanish herself. Her French classes date back to school days whilst she had never learned any Spanish. So she used Google Translator for understanding the words and tried to get the meaning right. Writing this report in Madrid, the author was lucky to have a Spanish native speaker at her side. However, some answers remained unclear even for this mother tongue.

In addition to both technical and personal limitations from the author's side, flaws in results may hence originate from the side of the survey takers. Not only can they have failed to get across a clear and unambiguous message. Also their individual understandings of and attention to the questions were obviously more or less accurate. For instance, at least seven participants rated the quality of ETUI courses although they had never taken part in them ($\geq 17\%$). Conversely, at least three ($\geq 7\%$) who had taken part missed to enter data in the respective field(s). That individual perceptions may differ can be furthermore illustrated by the following example. Two representatives working for the same union had different opinions regarding the question on which level their organisation is active. Their employer is a national trade union confederation. While one confirms the national level as organisational activity area, the other advocates the global one.

Finally, there are two responses from the Hungarian confederation LIGA although only one person from this confederation is registered on the official conference participation list.

G. Methodological Note on the Beckers EWC Survey

Building on the experience of compiling the ETUI Madrid survey, the Beckers EWC survey includes some common questions whilst others are more specific to the EWC training. The questionnaire looks as follows:

Beckers EWC Training Dec 2013

Dear course participant,

As part of analysing your training session for my PhD thesis, I would like to know more about your opinions as well as you as a person.

Therefore, I would very much appreciate if you were so kind and take probably about 15 minutes for answering the following questions. Please be honest – there is no 'right' or 'wrong'. If there is a question which does not apply to you, please write n/a = 'not applicable'.

Thank you very much for your support!

And now enjoy...

* **Erforderlich**

1. **Which COMPANY are you employed by? - Quelle entreprise travaillez-vous par? - Które firmy są Państwo zatrudnieni przez? - Bei welcher Firma arbeitest du? ***

Markieren Sie nur ein Oval.

- Beckers Group
 ColArt
 Lindénguppen

2. **Which COUNTRY is your company based in? - Dans quel pays se fonde votre entreprise? - W jakim kraju jest oparta firmie? - In welchem Land sitzt deine Firma? ***

Markieren Sie nur ein Oval.

- France
 Germany
 Poland
 Sweden
 United Kingdom

3. **What do you PERSONALLY understand of WORKER CONSULTATION and INFORMATION? - Qu'est-ce que vous comprenez personnellement de l'information et la consultation des travailleurs? - Co osobiście zrozumieć pracownika konsultacyjnych i informacyjnych? - Was verstehst du persönlich unter Unterrichtung und Anhörung von Arbeitnehmern? ***

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4. What do you consider the purpose of the Beckers EWC? - Que considérez-vous l'objet du Beckers CEE? - Co uważasz za cel Beckers ERZ? - Was ist deiner Meinung nach der Zweck des Becker EBRs? *

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5. Why is the establishment of the Beckers EWC IMPORTANT to your COMPANY? Pourquoi est-ce que la création du Beckers CEE important pour votre entreprise? - Dlaczego jest ustanowienie Beckers ERZ WAŻNE do Twojej firmy? - Warum ist die Gründung des Beckers EBR für dein Unternehmen wichtig? *

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6. Why have you PERSONALLY committed to developing the Beckers EWC? - Pourquoi avez-vous personnellement engagée à développer le Beckers CEE? - Czemu osobiście zaangażowany w rozwój Beckers ERZ? - Warum hast du dich verpflichtet, den Beckers EBR zu entwickeln? *

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7. How USEFUL was the EWC training content to you? - Quelle était l'utilité du contenu de la formation CEE pour vous? - Jak przydatne było ERZ treść szkolenia do Ciebie? - Wie nützlich war das EBR Training für dich? *

Please skip if you have not taken part in this course so far.

Markieren Sie nur ein Oval.

1 2 3 4

Very Not at all

8. How **SATISFIED** were you overall with the quality of the EWC training? - Comment étiez-vous satisfait de la qualité générale de la formation CEE? - Jak bardzo byłeś ogólnie z jakości szkolenia ERZ? - Wie zufrieden warst du insgesamt mit der Qualität des EBR Training? *

Markieren Sie nur ein Oval.

1 2 3 4 5

Absolutely delighted Very unsatisfied

9. What have you **GAINED** from the training **PERSONALLY**? - Que vous a apporté de la formation personnellement? - Co ty zdobyte podczas szkolenia osobiście? - Was hat dir das Training persönlich gebracht? *

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10. What have you **GAINED** from the training as **EWC GROUP**? - Que vous a apporté de la formation en tant que groupe CEE? - Co ty zdobyte podczas szkolenia jako ERZ grupy? - Was hat dir das Training als EBR Gruppe gebracht? *

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11. What have you **MISSED** from the training **PERSONALLY**? - Qu'est-ce que vous avez manqué de la formation personnellement? - Co Przegapiłeś ze szkolenia osobiście? - Was hat dir persönlich beim Training gefehlt? *

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12. What have you **MISSED** from the training as **EWC GROUP**? - Qu'est-ce que vous avez manqué de la formation en tant que groupe CEE? - Co Przegapiłeś ze szkolenia jako ERZ grupy? - Was hat dir als EWC Gruppe beim Training gefehlt? *

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13. **What TOPICS / ACTIVITIES do you consider essential for enhancing worker representatives' capacity to WORK TOGETHER ACROSS COUNTRIES?** - Quels sujets / activités considérez-vous comme essentiels pour améliorer la capacité des représentants des travailleurs à travailler ensemble à l'échelle transnationale? - Jakie tematy / działania uważa Pan za istotne dla podnoszenia pracownika przedstawiciela "zdolność do współpracy w różnych krajach? – Welche Themen / Aktivitäten hältst du für unerlässlich, um die Kapazität von Arbeitnehmersvertretern zu verbessern, länderübergreifend zusammen arbeiten zu können? *

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14. **What training TOPICS / ACTIVITIES would you need PERSONALLY for enhancing YOUR capacity to WORK TOGETHER ACROSS COUNTRIES?** - Des quels sujets / activités auriez-vous besoin personnellement pour améliorer votre capacité à travailler ensemble à l'échelle transnationale? – Jakie tematy / działania treningu byś osobiście potrzeba Ulepszanie współpracy ponad zdolności krajów do? - Welche Themen / Aktivitäten benötigst du persönlich, um deine Kapazität zu verbessern, länderübergreifend zusammen arbeiten zu können? *

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15. **What is your GENDER?** - De quel sexe êtes-vous? - Jaka jest Twoja płeć? - Was ist dein Geschlecht? *

Markieren Sie nur ein Oval.

- Female
- Male

16. **What is your AGE?** - Quel âge avez-vous? - Ile masz lat? - Wie alt bist du? *

Markieren Sie nur ein Oval.

- up to 25
- 26 – 35
- 36 – 45
- 46 – 55
- 56 – 65
- 66+

17. **What is your highest EDUCATION DEGREE? - Quel est votre niveau d'étude le plus élevé? - Jaki jest twój najwyższy stopień edukacji? - Was ist dein höchster Ausbildungsabschluss? ***

Markieren Sie nur ein Oval.

- Secondary
- Apprenticeship
- Bachelor
- Master
- Doctorate
- Sonstiges:

18. **Which area RELATED to (transnational) workers' representation does your educational background include? - Quelle branche associée à la représentation des travailleurs (transnationales) vos études couvrentelles? - Który obszar związany z reprezentacją (transgranicznym) pracowników ma swoje wykształcenie należą? - Welchen Bezug zu (transnationaler) Arbeitnehmervertretung hat deine Ausbildung? ***

Please tick all that apply.

Wählen Sie alle zutreffenden Antworten aus.

- Labour Relations / Industrial Relations
- European / International Relations
- Sociology
- Political Sciences
- Human Resources
- None
- Sonstiges:

19. **For how many YEARS have you been with your company now? - Depuis combien d'années avez-vous été avec votre entreprise maintenant? - Na ile lat byłeś z firmy teraz? - Wie lange arbeitest du schon bei deiner Firma? ***

Markieren Sie nur ein Oval.

- 0-2
- 3-5
- 6-10
- 11-20
- 21+

20. **Are you member of your company's local WORKS COUNCIL? - Êtes-vous membre d'œuvres locales du conseil de votre entreprise? - Czy jesteś członkiem Twojej firmy lokalnej rady zakładowej? - Bist du Mitglied im Betriebsrat deiner Firma? ***

Markieren Sie nur ein Oval.

- Yes
- No
- We don't have a local works council
- Sonstiges:

21. **Are you member of a TRADE UNION? Êtes-vous membre d'un syndicat? - Czy jesteś członkiem związku zawodowego? - Bist du Mitglied einer Gewerkschaft? ***

Markieren Sie nur ein Oval.

Yes

No

22. **What will you PERSONALLY COMMIT to for the EWC to becoming an EFFECTIVE representation body? Que ferez-vous vous engager personnellement à la CEE de devenir à l'unité représentation effective? - Co osobiście zaangażować się w ERZ do stania na skutecznego organu reprezentacji? - Wozu wirst du dich persönlich verpflichten, dass der EBR eine effektive Arbeitnehmervertretung wird? ***

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23. **What other COMMENTS / SUGGESTIONS do you have? - Quelles autres remarques / suggestions aimeriez-vous m'adresser? - Jakie inne uwagi / sugestie masz? – Welche weitere Kommentare / Vorschläge hast du? ***

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a) Sample Characteristics

The educational level among the EWC members is noteworthy. Four of them have graduated from university. While three still have the opportunity to move on from Bachelor level (UK, 2x France), one obtained a Master degree (Sweden). Another French has not moved beyond secondary education, whereas the German has stopped his formal education after completing an apprenticeship.

His apprenticeship is not related to (transnational) workers' representation, though. The British chair has a background in sociology/political science. The Swedish colleague is arguably most suitably qualified putting forward Labour Relations/Industrial Relations as his subject of study. The two French are undergraduate natural scientists in biology and chemistry respectively. The former as well as the French colleague with secondary education mention yet an educational relation to labour relations.

Whilst the French woman taking the questionnaire was younger than 25, the age of the five men ranged from 36 to 65. She has been with her employer (Beckers) between 3 and 5 years. Another French colleague has been employed by ColArt since 6 to 10 years. The members from Germany, Sweden and one from France have been with Beckers between 11 and 20 years. The British chair has worked for Beckers since more than 21 years.

Not all survey participants are member of a works council, namely the British and the Swedish. Both responded that they do not have any. The remaining comrades are works council members. Notwithstanding the presence of a works council, all respondents are unionised.

H. Excursion: Why do least ETUI Activities take place in the Nordic Countries?

The answer to this question seems a matter of *location, restructuring, resources, responsibilities* and the issue which was discussed before, i.e. the *ETUI course programme*.

A senior Education Officer from Sweden, two Education Coordinators from Finland and the Swedish ETUI PedCom Representative who represents Denmark, Sweden and Finland in the Committee point to longer travel times to the Nordic countries. Direct flights may not be available from many European cities. Also the venues may be difficult to reach if they are not in the city centre, as in the case of the Swedish LO School Runö. It dawns to the Scandinavian ETUI PedCom member, however, that putting the Nordic countries' assumed peripheral location in Europe as an obstacle to hosting more ETUI activities is "maybe ... just an excuse" (Melin, 2015, email).

In fact, flight times on the continent differ arguably not too much from Central Europe. Moreover, Spain is quite peripherally located too and yet the two union confederations, CCOO and UGT-E, are much more active in hosting ETUI activities (11 days). It seems hence right to say that putting forward the matter of location is more an excuse than a reason.

Much more sense makes the issue of financial resources. The problem seems not the relatively higher travel costs for the participants to the Nordic countries, though, which a Swedish and a Finnish Education Officer highlight (Andersson, 2015, email; Junno, 2015, email). Arguably, flight costs within Europe are not too different anymore due to low-cost airlines exercising downward pressure on fares. Rather, it is the ETUI who cannot afford the higher cost of living in Denmark, Sweden and Finland. Especially the price for housing exceeds the Education budget: "During the last year I worked for ETUI [i.e. 2013] the budgets for accommodation allowed something like 145 Euro per participant. The real cost at Runö was about 210 Euro and quite a bit higher at the LO-skolen in Helsingör in Denmark", a retired ETUI Education Officer explains (Le Douaron, 2015, email). The Swedish right-wing

government removed funds for labour education (Melin, 2015, email). This has certainly contributed to increased costs for the labour schools.

The Education Officers in Sweden and Finland try to “offer a good price” (Andersson, 2015, email) respectively “reasonable cost” (Junno, 2015, email), but this is not always possible. Nonetheless, the Finnish colleague from TJS Study Centre has obviously successfully sold the “opportunity of organizing international training” (ibid) to STTK. The confederation agreed to organise two activities in collaboration with the ETUI within the previous year.

The fact that the trade union education centres in Scandinavia are too expensive for the ETUI has worsened since the national confederations have outsourced their schools and restructured them into own cost centres, more exactly, into foundations. The education centres have thus own responsibility for their rentability now and have largely lost financial support from the confederations (Le Douaron, 2015, email). As a Senior Consultant from LO-Skolen in Denmark describes:

“Before 2008 Lo-skolen was very active in European projects – we were managing a lot of ETUI courses. But after 2008, where the organization was changed, and the Lo-School lost the economies support from Danish LO, we have had no other possibilities than to reduce our involvement in international ETUI projects. [...] Restructuring TU education is a tuff topic for the moment – and has been – that last couple of years” (Munch Kofoed, 2015, email).

As a consequence of the national confederations outsourcing their education, also the trainers are in most cases not employed by the unions any longer, but by the education centres. As a result, the confederations and the study centres appear to play some ‘financial responsibility ping-pong’ regarding collaboration with the ETUI. The confederations perceive that the study centres should collaborate with the ETUI. For the education centres, however, the ETUI is a rather uninteresting partner since business with them would be a loss-making venture, since the ETUI cannot fully pay the Nordic prices. At the same time, even if the confederations assumably want their education centres to collaborate with the ETUI, the confederations sound unready to fund such activities (Le Douaron, 2015, email). In other words, outsourcing education has backfired to the confederations in that it has led to reduced collaboration in transnational labour education outside Scandinavia.

Finally, the issue of course offer suitability arises. “Most of the ETUI projects [...] are not enough directly related to the Danish Trade Union context”, the LO-Skolen Senior Consultant complains (Munch Kofoed, 2015, email). In order to counteract the trend of decreasing membership numbers, which could be stopped in some Danish trade unions already, there is “only one single goal for all TU activities: organizing, organizing, organizing”, he says. Indeed, the Danish Officer stressed this in the Madrid survey, too.

However, it does not convince that 'organising' concerns the Danish labour movement only. Given the decline in union membership in whole Europe during the last three decades, arguably all national trade union movements would benefit from upskilling in organising. Explicitly the representatives from Bulgaria (PODKREPA), Portugal (UGT-P), Cyprus (SEK) and Hungary (LIGA, SZEF) ask for 'organising' in the future ETUI course programme (Madrid survey). Arguably, the LO-Skolen could also offer to host some ETUI activities on 'organising'. But, then again, the previously described matter of insufficient ETUI funds would apply.

At the same time, the trade union education centres in Northern Europe have not really engaged in shaping the ETUI programme either. The Finnish Education Coordinator at the TJS Study Centre admits that "Finnish confederations and unions have not been too active in making proposals to the ETUI training program" (Junno, 2015, email). The Scandinavian ETUI PedCom member probably speaks for the whole Nordic region when she states that "we have not made an active choice not to have more activities. But neither an active choice to get more" (Melin, 2015, email). Critically speaking, complaining that the programme does not suit, but making no real efforts in suggesting topics either will improve nothing. Hence, more pro-activity in (re-)establishing collaboration between the Nordic confederations respectively their education centres and the ETUI seems highly required.

Yet, two mutually reinforcing grounds might hamper more future Nordic involvement in European trade union education. The reason why the Nordic countries have not been more pro-active in shaping the ETUI course programme appears, on the one hand, that they do not feel the need or perceive real benefit from it. Besides the matter of insufficient ETUI funds, the Scandinavians have an extensive range and depth of labour education activities both at national and Northern-regional level themselves and the number of participants is high. In 2014, the Danish LO alone trained 24,563 of 1,222.800 (2013) trade union members (i.e. 2.4%), and spent 353 million DKK (€47 million) in education and training (Munch Kofoed, 2015, email). On the other, they perceive a lack of attention by the ETUI. "Before each new training season, we take up the issue of ETUI's programs and we get very little response", the Scandinavian ETUI PedCom member argues (Melin, 2015, email). Notwithstanding the context of Nordic trade union education which obviously tends to discourage further partnership with the ETUI, it is a choice of the people in charge to break vicious patterns. Thus, the LO-Skolen Consultant has tried to uphold an 'open-door policy' towards the ETUI. He has also talked to the ETUI Education Director about the Danish unions' strategy focus on organising.

However, before entering into more collaboration with the ETUI on learning activities, the Nordic countries want to get their regional education strategy right first. In early March 2015, the representatives of the labour education centres in Denmark, Sweden and Finland meet for 3 days informally in order to discuss their future plans regarding "common projects, common

education, new ideas and so on” (Munch Kofoed, 2015, email). However, such meetings seem not to be too frequent. Rather, the Nordic labour education representatives would see each other “almost only in the ETUI context. [...] If we had [more contact], we would certainly be better at it [i.e. shaping the ETUI course programme]. There we could improve” (Melin, 2015, email). Nonetheless, this informal 3-day meeting is arguably a prime example of “the special Nordic way” of collaboration: “we understand each other’s language, [...] We have so much collaboration in many levels – and the systems both societal [and] in relation to trade union are so similar” (Munch Kofoed, 2015, email).

Does it mean that transnational labour collaboration á la Scandinavia will never really arise among Europe and the world, because the languages, social and IR systems are all too different? Not necessarily. If transnational labour solidarity is to arise, labour representatives and their organisations have just to uncover similarities that go beyond the obvious – and trade union education may empower them in so doing.

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