



YOUR TURN 2

New Insights into Union Renewal

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European Trade Union
Committee for Education



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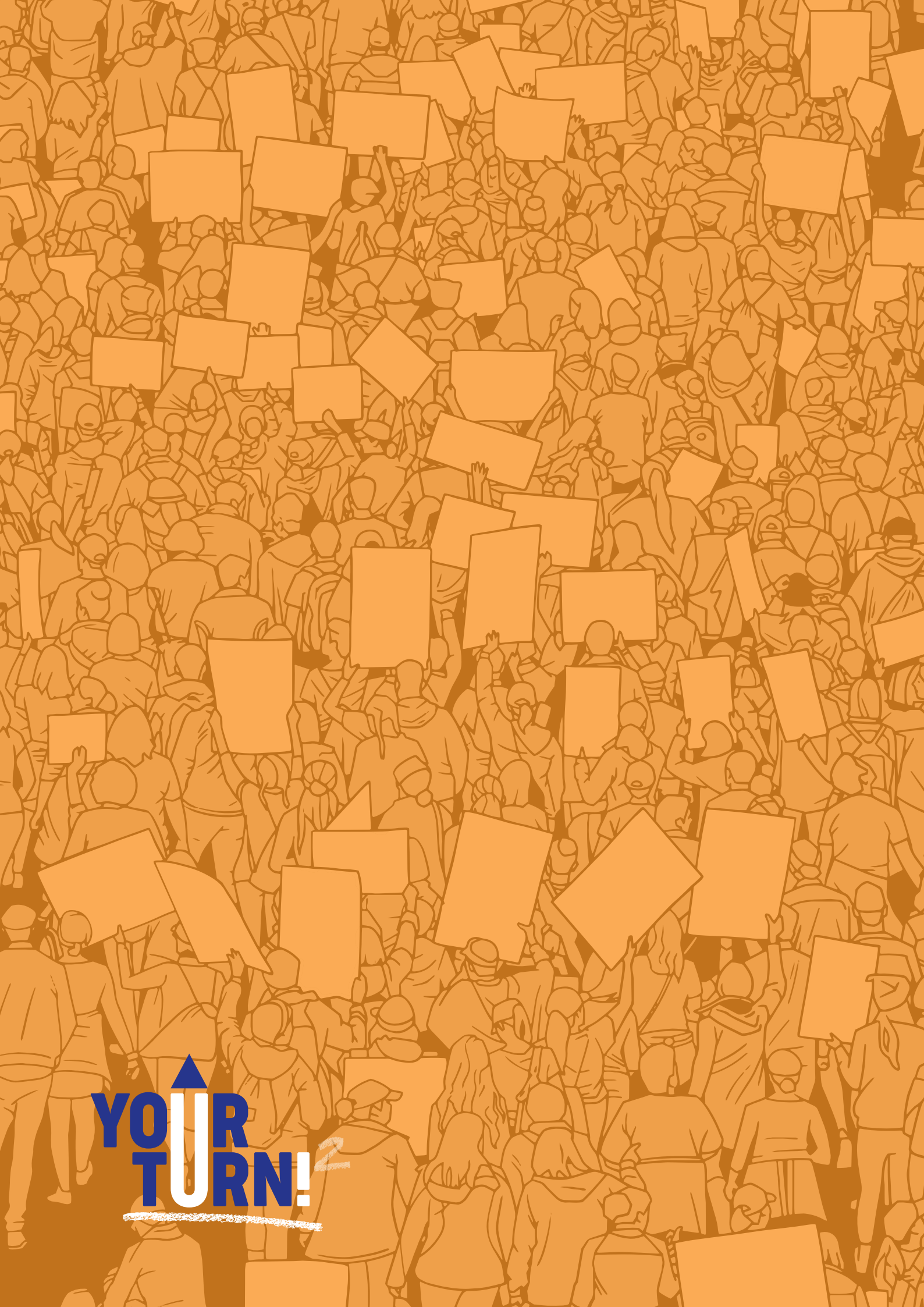
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YOUR
TURN!



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Introduction

Trade unions exist for many reasons, and can have diverse objectives. These objectives are determined by union members through agreed democratic structures. However, whatever the goals, the common theme that unites trade unions is their commitment to bring about change.

The capacity of unions to make change happen depends in large part on their ability to mobilise the collective power that resides in the union's membership to create a movement for change. However, unions' ability to mobilise this power has often been diminished in recent years. In some cases this is explained by long term societal trends that have fragmented collective identities, while other explanations focus on the intentional acts of employers and governments who have sought to marginalise trade union influence and make collective organising by workers more difficult. Multiple factors are at play, working in complex and interdependent ways.

Union renewal is the process of consciously confronting these developments and taking the strategic decisions and actions that seek to rebuild union power. It does so by seeking to activate a union's most valuable resource – the power that resides in the workforce (both union members, and those who are not yet union members). It recognises the profound challenges that confront the education trade union movement, but it is rooted in the optimism that change is not only necessary, but possible. It echoes the sentiments of a teacher and union representative who observed, when reflecting on her experiences in her school:

*If you can organise my school,
you can organise anywhere.¹*

The challenge is to find a way to make change happen.

1 Quoted in Little, G., Sharp, E., Stevenson, H. and Wilson, D. (2023) *Lessons in Organising: What Trade Unionists can Learn from the War on Teachers*. Pluto Press.

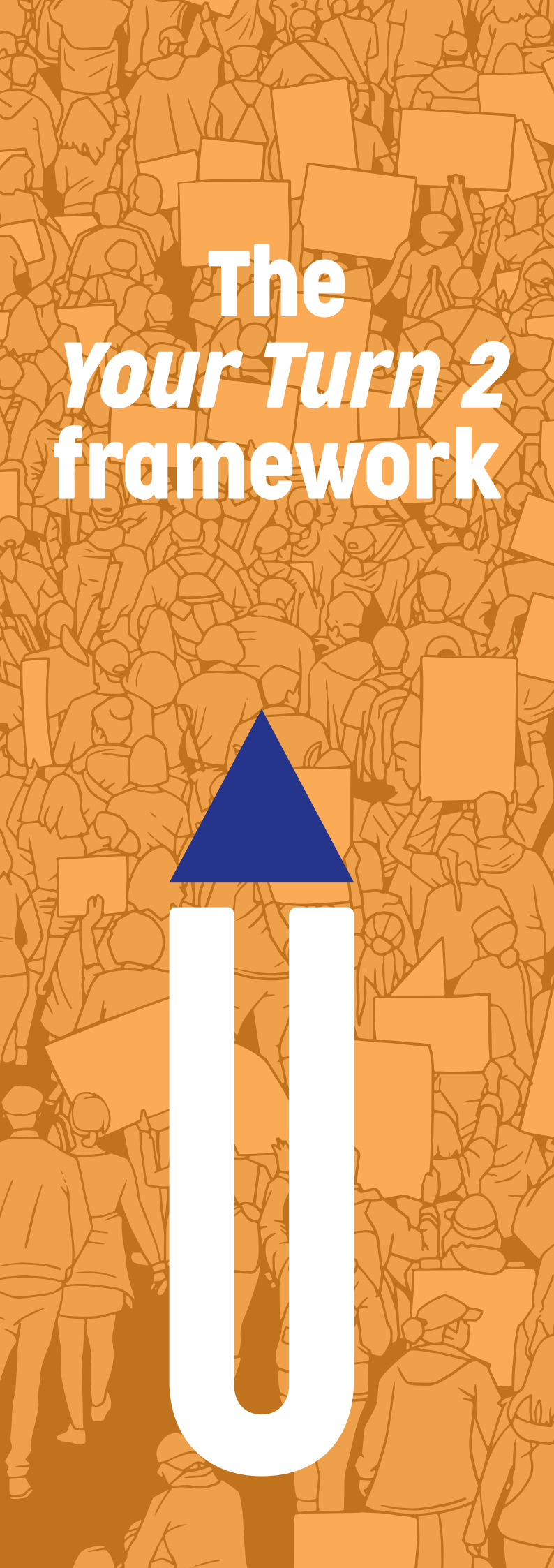
In this report we build on an earlier study, *Your Turn 1*, as we focus on the need to build leadership capacity in education trade unions. However, our concern is not narrowly focused on those traditionally considered as 'leaders', but rather our interest is in developing leadership capacities more widely – those practices that build the union power that makes change happen. That is why we refer to the leadership we are interested in as 'transformative leadership' – because we recognise that change happens at multiple levels. Achieving change for members requires unions, and union members, to change too.

Specifically, our focus is on developing forms of leadership that are close to union members in their workplaces. We refer to this as 'link leadership' because of the critical role it plays in bonding workers to the union organisation. It builds union power by focusing on the point of connection between the union's activist core (those union members who ensure the union functions every day) and its wider membership (who are typically more removed and engaged less frequently). It seeks to make this connection a source of strength, rather than a point of weakness. We do not claim that link leadership is intrinsically new – in many ways it builds on existing practices and well-established research. However, we do suggest that link leadership offers novel ways of thinking about how it is possible to build union power and drive positive change. In this report we describe what we mean by link leadership and what forms it can take in different contexts. We explain why it is crucial to union renewal, and how it might be developed by the intentional and strategic actions of those already involved in the union.

The report provides a *Your Turn 2* framework for thinking about link leadership, alongside a set of practical actions that can make a positive contribution to developing this type of leadership.

The ideas that are presented are the outcomes of the *Your Turn 2* project, designed as a collective endeavour involving

researchers, the project's Advisory Group and participants in the project's workshops. It also reflects findings based on six short case studies from individual unions. As such, project outcomes are the result of a process of co-construction in which ideas developed over time from the dialogue that all project actors engaged in. For example, in early discussions, project participants used the terms 'key local leader' and 'local leader' to describe what we now call 'link leadership'. As the discussion developed it was felt the term link leadership was able to capture more accurately the phenomenon we are describing. However, reflecting this dialogue over time, all these terms are used at different points in this report. Details of the project process are described in Appendix 1: *Project Methodology*. Appendix 2 provides a conceptual map which sets out the key ideas that inform the *Your Turn 2* framework. This allows any interested reader to explore the underpinning ideas in more detail, and to consult relevant references. Appendix 3 details the six case studies which provide examples of link leadership in practice.



The *Your Turn 2* framework

Building union power through transformative leadership

Here we present the *Your Turn 2* framework. It is the extension of work that was originally presented in *Your Turn 1* with its focus on ‘building at the base’, and can be considered as a sharpening of some of the key aspects of the initial framework. The research and ideas that underpin the work are set out in the full report in the form of a conceptual mapping. This provides sources that can act as further reading for anyone wishing to explore the ideas in more detail.

This is a framework – not a model. A framework is a set of ideas that allows us to think how we approach a problem. It is meant to be flexible – and capable of being adapted to often diverse contexts. A model suggests a plan to be followed or a template to be applied. What we present here is definitely not that. We are sceptical that such models have utility in diverse contexts.

Here we present the framework as a set of foundational assumptions accompanied by three key propositions. Each proposition has an associated consequential claim.

Foundational assumptions

Trade unions may have diverse aims and objectives, dependent on a range of contextual factors. It would not be appropriate for us as researchers to offer any opinion on the different policy positions presented by, and within, education trade unions. That is for a union’s members to determine. However, our view is that the one issue that is common to every trade union, is a commitment to achieve change in some form. Trade unions exist to secure

improvements and advancements, howsoever defined. That requires a challenge to the *status quo*.

Commonly the changes that are in union members' interests are not seen by employers as in their interests. There is therefore a conflict over interests and trade unions will only be able to influence the outcome of that conflict if unions are able to shift the balance of power between employers and unions in favour of the union. The challenge for the union therefore is to always seek to *build union power*. Whatever the starting position, there is always an imperative to build and renew union power. Without conscious, strategic effort to constantly build union power, in a changing world and over time, trade unions atrophy and union power declines.

Union power is impacted by many factors, not all of which are readily influenced by the union. In this study our concern is on building union power by focusing on the two sources of union power that the union can control, in part at least. Firstly, the union can grow membership by converting workers into union members, and secondly it can strengthen its membership by building member commitment, measured ultimately by members' willingness to take collective action with other union members to achieve agreed union demands. Typically, this power is *latent power*. It resides in the workforce, but it is not 'live' as many workers may be quite passive in relation to workplace issues, even when working conditions are a source of dissatisfaction. The challenge for the union, or more accurately those who are active in it, is to activate this latent power and in this report we refer to 'organising' as a specific type of union leadership that seeks to draw this latent power into the union and energise it. Where successful it holds out the possibility of tipping the balance of power between employers and workers in favour of the latter. We acknowledge that unions can amplify the power they have by developing alliances with forces beyond the union itself. This is

unquestionably important work, but this report deliberately focuses on building power at the workplace, not least because this is the foundational power that provides the base for the wider construction of alliances.

Change is therefore the core concern for all unions, and this framework provides ideas for thinking about change in union contexts. In this study we identify anyone who drives these change processes as being a leader – regardless of their 'level' in the trade union hierarchy, and regardless of whether they hold a formal union position or not. In this sense we are more concerned with 'leadership' (as a set of collective capacities), than narrowly with leaders (as individuals in a hierarchy). Specifically, we refer to 'transformative leadership' because we recognise that the change we are talking about has to take place at multiple levels and in many forms:

- Societal change – changing the wider environment that frames the context within which workers undertake their work.
- Workplace change – changing the terms and conditions in which workers exchange their labour with their employer.
- Trade union change – changing the organisation to build the power to advance the collective interests of members.
- Worker change – changing thinking so that workers recognise their shared interests in achieving change, and their own capacity to work with others to make change happen.

Here we provide a definition of transformative leadership that informs this study:

Transformative leadership involves acting with intentionality to make change happen that could not happen if an individual acted alone. It is change that requires collective action. Transformative leadership is grounded in union values and is always driven by a purpose. It identifies and uses the agency available to navigate prevailing conditions and it actively builds union power to make change happen.

This vision of transformative leadership is underpinned by three key propositions. Each proposition has an associated consequential claim.

- Transformative leadership is a practice not a position.
- Transformative leadership is strategic, educative and relational.
- The transformative leadership that matters most is the leadership closest to the members – link leadership.

1. Transformative leadership is a practice not a position

Leadership is intentional activity undertaken to make change happen – whatever that change may be. This approach to leadership places the focus on the actions of all those engaged in making change happen, and not just on those formally identified as occupying roles as ‘leaders’. Senior leaders in trade union organisations are key individuals, and they have a critical role to play in building union power, but our principal focus is on the actions of anyone engaged in leadership, defined as engaging others in building a collective movement for change.

Conceived in this way, leadership must, by definition, be distributed. It does not exist only in a hierarchical form but is found throughout the union – at national, regional, local and workplace level. Because leadership is exercised at all levels of the organisation it is also, by definition, collective. It clearly depends on the actions of individual union members, but its potential can only be realised when individual activities combine to create a collective capacity for change.

In this study we highlight ‘organising’ as a specific type of leadership engaged in building union power among workers (those who are union members, and those who are not yet union members). Organising is a verb – it refers to the actions of those engaged in activating the latent power that resides in the workforce.

Associated consequential claim:

- ‘Leadership’ does not exist in an inert form. It is not something that is fixed-sum and pre-determined. It is not invested in some individuals and not others. As a set of social practices enacted by members across a union, leadership can be developed. It can be expanded. Those with the potential to exercise leadership can, and must, be nurtured and supported. Transformative leadership is self-renewing as effective leaders always develop leadership capacity in others.

2. Transformative leadership is strategic, educative and relational

A focus on ‘leadership’ requires us to be explicit about the actions and behaviours that are central to our understanding of what leadership means. In this study we identify three leadership ‘capacities’ that are at the core of a leadership that is transformative.

Strategic leadership – the ability to combine values and purposes with a plan capable of making change happen. Transformative leadership always exists for a purpose – it is about making change happen that brings about improvements, material and ideational, for members or service users. Strategic leadership is able to formulate a plan that helps navigate prevailing conditions (favourable and unfavourable) in order to secure organisational objectives. Strategic leadership has both an ‘external’ and ‘internal’ element. An external focus is on the key campaigns the union seeks to win, while an internal focus is on the organisational changes necessary to build the power that can achieve campaign success. Both are intimately connected. Strategic leadership typically involves making difficult decisions (for example, in relation to resource allocation), but it also requires courage as any struggle over contested interests requires a willingness to be defiant.

Educative leadership – recognises that union power resides in collective action, but that to change how workers act, it is necessary to change how they think. Thought precedes action even if the two exist in a dialectical relationship. Transforming the thinking of others through deliberate intervention is what we mean by educative leadership – it is fundamentally pedagogical. Such leadership assumes many forms, but three particular aspects are highlighted. First, educative leadership involves the ability to formulate, articulate and communicate compelling narratives for change. These appeal to workers’ ideational interests (beliefs and values) as well as their material interests.

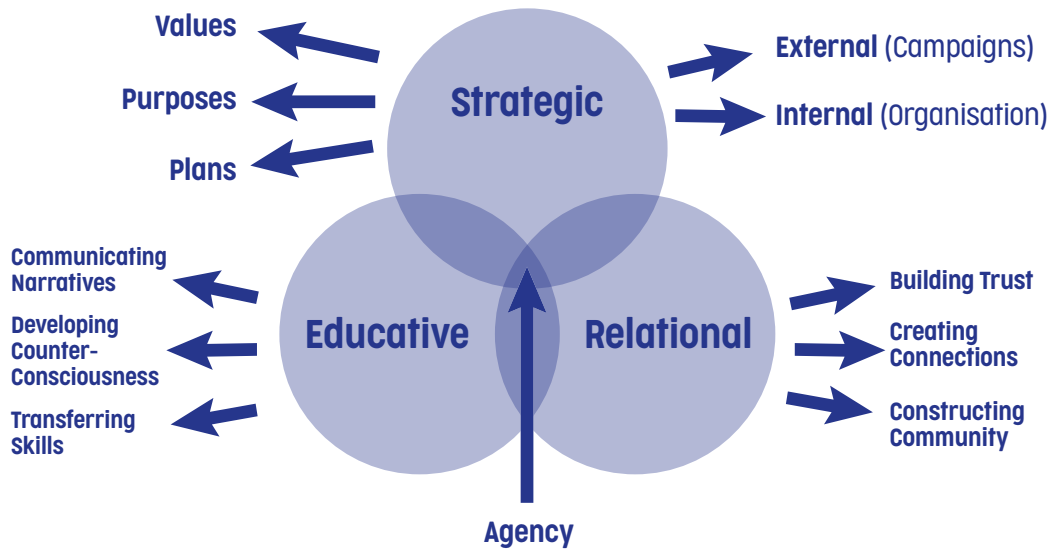
Educative leadership involves actively winning support for any proposed change. Second, it involves working with fellow workers to challenge the ‘common sense’ that normalises everyday inequalities and injustices while rejecting the notion that ‘there is no alternative’ and that change is not possible. Educative leadership works to explain current injustices, articulate realisable

alternatives and communicate a vision of how collective action can bring about change. It develops a ‘counter-consciousness’ rooted in trade union values and purposes that stands at odds to the every day ‘common sense’ people experience in their daily lives. Finally, educative leadership develops the practical skills in others that help to build leadership capacities more widely. From formal training, to informal mentoring (and everything in between), educative leaders are involved in building leadership in others.

Relational leadership – builds union power by strengthening the human connections between workers, as the basis for developing a union identity grounded in principles of mutual support and solidarity. Relational leadership is person-centred and draws on a wide range of interpersonal skills to create human connection and cultures of solidarity. Above all, relational leadership builds trust that can be described as forming the glue that bonds members to the union. Union power often relies heavily on the informal networks of workers that exist in workplaces having a union-orientation. Relational leaders are able to centre this union orientation in workplace groups and connect informal workplace based networks to the union. At its most effective it deepens union democracy by connecting the informal democracy of workgroups in the workplace with the more formal democracy of the union’s democratic structures. Relational leadership constructs community based on a sense of shared interests and solidarity. Nurturing and building these relationships often requires a sophisticated set of interpersonal skills to be exercised by the leader.

A summary of these ideas is presented below:

YOUR TURN 2 Leadership Capacities



Associated consequential claim:

- Building union power requires the development of strategic, educative and relational leadership capacities, at all levels of the union – from the national Executive Board, to the individual workplace. They are all interdependent and one capacity cannot be completely uncoupled from another. However, while transformative collective leadership requires the organisation to be able to demonstrate all these capacities not every individual leader needs to be simultaneously strategic, educative and relational.

3. The transformative leadership that matters most is the leadership closest to the members - link leadership

Transformative leadership needs to be evident at all levels of the union. Leadership is not something that exists only at 'the top' and that needs to be transmitted downwards. Rather it must exist at all levels. However, our argument is that the most important leadership that exists within the union is the leadership that is closest to the members. Posed simply, when a worker 'sees' the union – who, or what, do they see? A figure on the TV news? An email message in an inbox? An occasional visit from an official they do not know? Or a colleague who they know personally and trust?

The union is stronger when there is a union presence in the workplace – someone who represents the union (formally, but maybe informally) and who makes the union real to the worker. Who this person is will look different in different contexts – different unions, different education sectors, different

countries mean there is no single role, or position, that represents this person in every context. We have avoided using any title that works in one context, but does not work in another.

In this study we call this person the **'link leader'** because they are the union representative who literally connects members and the union. The 'frontier' between the union and members is not separate and remote, but porous and integrated. In earlier stages of the project we referred to this person as the 'key local leader' or 'local leader', and these terms are used at different points in this report. They all refer to the same phenomenon.

Although 'link leadership' may look different in different contexts we identify three 'dimensions' of link leadership that are not context specific will determine the nature of the connection – put simply, whether the link is stronger, or weaker.


- Proximity (length) – distance matters. The closer the link leader is to their colleagues the stronger the connection is likely to be. A remote link is likely to be a weak link.
- Activity (breadth) – what does the link leader do? What is the range of actions they feel confident to undertake? If the link leader's role is narrow, perhaps little more than passing on union post to members, then union presence will have limited impact. However, if the link leader is able to organise and represent members (to the union, to the local management) their role is amplified. Members do not just 'see' the union – but they see the union make a difference in their workplace. They experience their own power and agency at work.
- Relationships (depth) – educative leadership, the ability to bring about action by changing thinking, depends on strong, trusted and deep

relationships. It also depends on the ability to engage in dialogue. Where link leaders have established high levels of trust they are able to build the connections that are the basis for a strong collective identity. They are able to have the direct conversations with colleagues that can shift thinking and turn passivity into action.

Strong link leadership deepens union democracy by creating workplace cultures where workers recognise their shared interests, and who are more likely to participate in union structures and actions. Link leadership breathes life into democratic structures that can sometimes seem distant and irrelevant.

Associated consequential claim:

- Building union power involves building at the base. There is no short cut. The most effective way to build union power is to build 'link leadership' – those local union leaders who are the connection between the local union's activist core (the people who keep the union running every day) and the wider membership (those workers who are the real source of union power but who typically have only limited engagement with the union). Developing link leadership draws activists and members closer. It simultaneously builds union power and deepens union democracy. The key strategic role of a union's organisational leadership is to consider how it constantly develops 'link leadership' – not only by recruiting link leaders, but by supporting and developing them so that their impact is maximised. This contributes directly to building union power in the immediate, but in the longer term it is also likely to develop the pipeline of local activists who take on leadership roles elsewhere in the union organisation. It is the key to union renewal.



Practical actions to support union renewal

The following actions draw on published research, the outcomes of Your Turn 2 workshop discussions in Barcelona and Utrecht and examples from the six case studies presented in this report.

Union renewal through building link leadership – the need for strategy

If unions are to adopt an approach to union renewal that focuses on building link leadership then it is essential to adopt a strategic approach. A commitment to such an approach needs to be part of a coherent and appropriately resourced long-term plan.

At the heart of the plan is a clear vision about the project's purpose. Each union has its own unique context – what is the link leadership that needs to be developed? What does it, or will it, look like? Does it already exist in the union and need strengthening? Or is it necessary to re-think what link leadership can and should look like? Does something new need to be developed?

The scale of the organisational change should not be underestimated. Structural change will be required but renewal typically requires cultural change too. It will be essential to secure an understanding of the project across the union. Winning support for the changes required is likely to be an on-going endeavour. There will be resistance to change and at times it will be necessary to make difficult decisions. For example, longer term objectives may need to be prioritised over what present as immediate demands and challenges. Established ways of working may need to be revised.

In all these endeavours it is important to locate the need for renewal in the wider context of the union's purpose – to bring

about change that improves the working lives of members. Union renewal is not something undertaken as an end in itself, but as a project that builds union power in order to win for workers. Union renewal cannot be disconnected from the struggles for improved working conditions, but is integral to them. Building link leadership is not a technical process without a context, but a dynamic activity that is driven by the desire for change. Building the union in an abstract sense is not the objective – winning for workers is the objective.

In the following sections we identify three areas of activity that must be at the heart of a strategic plan.

Clarify the role

Help those engaged in link leadership to know what their role is, what they can do and how they might develop

- Have a clear sense of the role of the link leader.
- Have expectations – people will often do more than might be expected if what is expected of them is clear.
- Start with small ‘asks’ – but scaffold activities so that link leaders can grow into the role.
- Link leadership is important in its own right – avoid drawing good link leaders into roles they do not want to undertake, simply because they ‘showed interest’. Avoid the risk of burning out any member who shows enthusiasm - or turning them off by giving them the jobs others do not want to do!
- Help link leaders to ‘make a difference’. Making a difference is a motivator – activism for its own sake seldom is. Organising is always for a purpose, not for its own sake. It is not a hobby.

Create the support

- Create the environment in which link leaders feel supported and valued.
- Build relationships – prioritise using in-person contact.
- Technologies help – group chats support fast, informal communication. These should be used to supplement in-person contact, not *in lieu*.
- Avoid isolation – many unions encourage workplace representatives to ‘pair-up’ so that each can support the other and one individual does not need to feel exposed.
- Develop horizontal networks – encouraging link leaders to connect with others in similar roles, for example across workplaces.
- Provide support and structure – but learn to trust and ‘let go’. Let energy develop – do not suffocate it.

Educate!

- Union power depends on what Marshall Ganz refers to as resources of ‘salient knowledge’ (including both relevant knowledge and skills). These do not just ‘exist’, but can be developed through education and training.
- Develop formal training programmes for link leaders – these are often national programmes, but local programmes are very powerful. Make sure programmes support link leader development, for example, having ‘introductory’ and ‘advanced’ versions.
- Use local training to connect link leaders and build networks.
- Train activists to become trainers so that link leaders see training delivered by their colleagues and peers.

- Train activists to support and develop other activists. Encourage activists to think about consciously supporting others. Union representatives who are not supported are more likely to quit – which is inefficient. A representative who stays, and develops, is invaluable. Time involved in activist development is always an investment.
- *Educate!* Basic knowledge transfer is important but union education should open up new possibilities and understanding. For example, effective link leaders understand their union and its history (and can communicate this to others). Likewise, they develop a sophisticated and critical understanding of policy and the political context. Union education is not only technical, but emancipatory. In the right circumstances, it should also be demanding.
- Consider how coaching and mentoring can support link leader development. This might be formal, or informal, or likely a combination of both. The resource can be intensive and care needs to be given to ensuring this is used where it has most impact. But as per above, this type of support is an investment that can provide real returns. It can also make an important contribution to supporting the development of those who do not always see themselves reflected in the union's activist leadership.

Appendix 1:

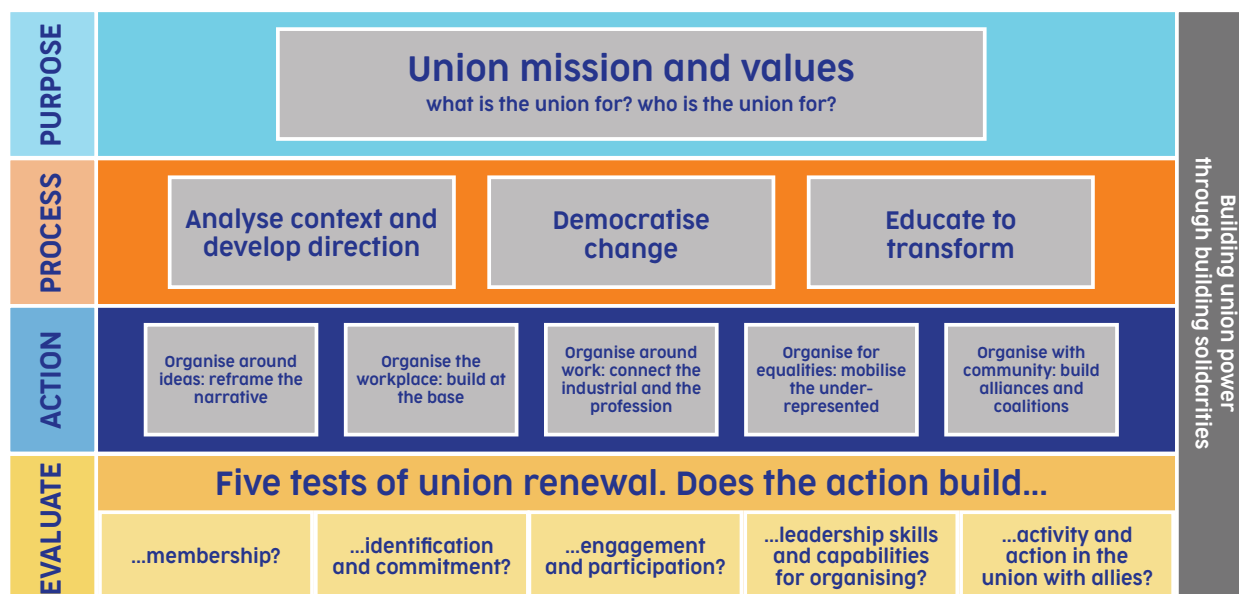
Project methodology: the (co-)construction of a project

In setting out its Call for Tenders ‘Your Turn 2: Teachers for Trade Union Renewal’ (EU Project 101143483) ETUCE continued its strategic commitment to work with individual member unions, and as a collective organisation, to build trade union power across the European education trade union movement. The Call for Tenders aligned with the priorities set by ETUCE’s Extraordinary Conference in 2021, and the conceptual framework presented in ETUCE’s ‘Action Plan on Organising and Renewal’. The proposal for a ‘Your Turn 2’

built on the initial report ‘Your Turn: Teachers for Trade Union Renewal’ (Stevenson et al., 2020), and the subsequent ETUCE - Friedrich Ebert Stiftung collaboration *Getting Stronger Together: Trade Union Renewal in Education* (Stevenson et al., 2024).

The *Your Turn 2* Call for Tenders identified four themes from the earlier ETUCE and ETUCE/ FES studies that were to underpin *Your Turn 2*: mobilising the under-represented; organising around ideas and campaigns; organising around work, community and society and organising around professional issues.

The research proposal from University of Naples Federico II and University of Nottingham took these themes, and sought to explicitly build on the *Your Turn 1* framework for transformative trade unionism:



(Stevenson et al., 2020, p. 92)

The initial proposal presented the following *Your Turn 2* research aims:

1. Investigating union renewal strategies as sources of union power.
2. Understanding the relationship between sources of union power and effective collective bargaining strategies.
3. Identifying the connections between union-based collective bargaining and community facing campaigns for public education

In ensuring a commitment to build on preceding projects the research team undertook to complete work as part of a collaboration in which the work would be developed in a partnership between the project Advisory Group, participants attending the project workshops and the research team of Professors Arienzo and Stevenson.

This commitment to partnership and co-construction was reflected in the design of the first training workshop, held in Barcelona and hosted by FECCOO (25-26 February 2025) (see ETUCE, 2025a).

Starting from a project working definition of union renewal and the building of union power the agenda was designed around a set of linked conversations, with each subsequent step in the agenda intended to build upon the dialogue from the previous session. For example, it was important for the whole project to begin with a sharing of ‘starting points’ in which participants from the countries represented highlighted their distinctive national challenges, but also opportunities for growth and renewal. An important project principle was to recognise the particular characteristics of different national contexts. This session led directly to a focus on the need to transition from ‘transaction to transformation’. Here the focus was on union members’ ‘every day

experience’ of the union. How do members’ experience the union in their workplace? How is it possible to actively develop union identity and solidarity? How can members who view their union membership in transactional terms be encouraged to engage and participate more in the collective life of their union?

Participants were then considered to ‘think differently’ about leadership. Leadership assumes many forms in trade unions, quite rightly. However, in this study, with its focus on renewal, the project is concerned with building the ‘leadership’ that is rooted in workplaces, and at the local level, and so discussion developed around analysing who these ‘leaders’ are, in their different contexts. What is the work they do, and how are they supported? How ‘formal’ is the role, and how does it relate to traditional union structures? These local leaders have the potential to form the organic link between the core of active union members and the wider membership whose connection to the union is more distant – but who are these people and what do they do?

The plenary session in Barcelona developed as a concluding discussion intended to shape the next stage discussion in Utrecht (2-3 October 2025) (see ETUCE, 2025b). It brought together the key themes of all the workshop discussions, and in particular the need to develop a deeper understanding of the role of the local leader. These discussions were then considered by the Advisory Group as it met in Brussels (8 May 2025) to finalise the Utrecht agenda.

The Advisory Group developed an agenda for the Utrecht Training Workshop which sought to continue and deepen the dialogue that had taken place in Barcelona. It was agreed that the meeting in Utrecht would focus on the role of ‘key local leaders’ – identified as those leaders (formal or informal) who are closest to union members in their workplaces and who represent the organic link between ‘the union’ and ‘the members’. These people

were recognised as being key to connecting the wider membership to the union, but also representing the potential ‘pipeline’ of union activists able to take on more substantial roles in the union in the future.

The Advisory Group understood that the emergence of key local leaders is a process of personal transformation and that pivotal to understanding how key local leaders can be nurtured and developed is the need to understand these processes of transformation. Crucially, it is important to understand how those active in trade unions can help these processes of transformations happen in others. It may be that individuals experience their own process of transformation due to external factors that impact them profoundly, but it cannot be satisfactory to have to wait for factors beyond anyone’s control to deliver the change that is necessary. More importantly, what actions can those active in trade unions take that can actively and intentionally make transformations happen? The Utrecht agenda was developed around addressing these questions in a deliberative and deep way.

The Utrecht workshop began by inviting all the participants to reflect on their own experiences of becoming ‘union activists’. Each participant had a unique story to tell – of why and how they became involved in trade unionism. What helped them connect with the union? What has helped retain their involvement in the union? How has involvement in the union developed them personally? What can we learn from our own experiences about how and why some individuals connect with their union, and see their union as key to bringing about the change they seek? The workshop discussion was highly illuminating – three themes emerged:

- The motivation to ‘get involved’ was often driven by an issue that had a material impact on workers. In some cases this was a national issue

impacting workers in a particular set of circumstances, for example regulations impacting newly qualified teachers. In other cases, the issues could be specific to a particular workplace, such as the management style of those with leadership roles in the institutions.

- In several cases participants described how they ‘emerged’ into informal leadership roles as workers recognised that action was necessary, and they identified a respected colleague to act as their spokesperson. In these cases there was often a recognition of the need for leaders to command respect, to be confident and to possess courage as this role necessarily involved confronting those in authority.
- In other cases participants described how a more experienced colleague helped to guide them towards the union. In some instances, participants described knowing little about trade unions, but there was someone who made a connection with them, was able to explain and encourage, and helped people ‘find the union’.

In many of the instances provided above, participants described how they found a ‘home’ in the union where they met like-minded colleagues and began to feel part of a community. However, it was acknowledged that this did not happen by accident – but it typically happened because someone made it happen. It required networks of people capable of having the appropriate conversations.

The workshop discussion then progressed by interrogating the concept of the ‘key local leader’ in different environments. The project’s emerging definition of a ‘key local leader’ was intentionally flexible – it recognised that those who might be identified as key local leaders may look very different in different contexts. This session focused on:

Who are these people in your context? What is their role? What are they expected to do? What do they actually/typically do? Is there a gap between expectation and reality? Is the role formal (clearly included in industrial relations and union structures) or more informal? Are they workplace colleagues or union staff? In what way do they provide the organic link between the union core and its wider membership?

In the following working group session the discussion considered how trade unions represented in the workshop sought to develop 'key local leaders'. Clearly this depends significantly on how a union conceives of the role. However, recognising these differences the participants focused on a set of common questions - How are 'key local leaders' identified? How are they developed? What is the role of education and training programmes? Is there a role for coaching and mentoring? How is leadership encouraged and developed from groups that are often under-represented in formal union leadership roles?

The Utrecht agenda was developed by the Advisory Group in such a way as to progressively deepen the collective understanding of the processes of transformation that develop activists and leaders. Transformation is typically presented as a visible and tangible change in behaviour – a non-union member joins the union, or a previously passive member of the union takes on activist roles. However, it is important to recognise that the action we see is the visible manifestation of the invisible shift in thinking to which the action is a logical response. Put more simply, in order to generate the actions we hope for (workers join the union, members participate in the union's democracy and actions) there is a need to change minds – to convince and persuade. Of course there are myriad ways in which unions seek to influence the thinking of others (members, workers who are not yet members, members of the public), and social media has opened up new possibilities. However, our starting point

is to recognise that deep shifts in thinking are most likely to occur as the outcome of personal contact between individuals based on relationships rooted in trust. Hence the working group session was a practical activity focused on developing the skills that help 'change minds'. Recognising the critical role of these 'organising conversations', participants were also asked to consider how these skills can be developed in others. In particular, how can key local leaders develop these type of dialogic skills, recognising that their location in the workforce, and their proximity to members, makes them uniquely well placed to be able to conduct such conversations? This highlights a key theme of the whole project – talk matters. In person dialogue, grounded in trusting relationships, is powerful.

The Utrecht workshop was completed when participants worked together to identify strategies and plans that might help to develop 'key local leaders' as the organic link in the union that connects the core of the union with its wider membership. These plans were then collated in the final plenary in order to guide the next stage of the project, in which a series of case studies were developed that seek to further deepen our understanding of the role, and the potential role, of the key local leader. As a central element of the project's commitment to co-construction involving workshop participants the research questions that underpinned the case studies emerged directly from the discussions that took place in Utrecht.

Case study research questions:

1. What does 'key local leadership' look like? (defined at this stage in the project as the union leadership that is closest to members in their workplaces)
2. How are key local leaders identified and developed?
3. How do key local leaders link to the formal democracy of the union?
4. What measures are taken to develop local leadership among groups often under-represented in trade union leadership roles, especially at the local level?

Case studies were conducted with several individual trade unions representing a range of contexts. Case studies were identified as a more effective way of developing the understanding that the project sought, rather than using a survey, as was initially proposed. The Advisory Group recognised that surveys across very diverse contexts often struggle to capture the depth and complexity of the context specific issues and therefore it was agreed that detailed case studies would generate more useful insights.

The case studies are presented in Appendix 3 and include:

Algemene Onderwijsbond - AOb
(Netherlands)

Federació d'Ensenyament de CCOO de Catalunya - FECCOO (Spain)

Federazione Lavoratori della Conoscenza – FLC CGIL (Italy)

Lithuanian Education and Science Trade Union – LESTU (Lithuania)

Pedagógusok Szakszervezete - PSZ (Hungary)

Syndicat National des Enseignements de Second degré - SNES-FSU (France)

After concluding the case studies, consideration was given to the most useful term to describe the leadership, and leaders, that are the focus of the study. Throughout the project participants had referred to 'key local leader' as a generic term, first adopted by Fosh (1993). However, in the final stages of the project the term 'link leader' was adopted. The term more accurately reflects the contribution of this form of leadership to the type of renewal envisaged in the project. It avoids confusion with Fosh (who used the term slightly differently), while also being easier to apply across diverse contexts where many unions already have specific terms they use to describe particular roles.

Appendix 2:

Your Turn 2 - building a conceptual map

In this section we set out some of the key ideas and references that underpin the Your Turn 2 framework. This section includes a full list of the references used throughout the report.

What are trade unions for?

Sometimes the most straightforward questions can be the most difficult to answer. At a very fundamental level it may be possible to agree around some core aims. For example, in an early study of trade unions Sydney and Beatrice Webb asserted:

A trade union, as we understand the term, is a continuous association of wage earners for the purpose of maintaining or improving the conditions of their working lives. (Webb and Webb, 1920, p. 1)

However, anything beyond this very general aspiration is likely to attract divergent opinions. What does 'working conditions' include? Any aspect of work, or only some aspect? And what is the role of the union beyond 'working conditions'? For example, does an education union have a vision of the type of education service it wants to see for its members and students? And what methods are to be used to secure these objectives? The range of responses to these questions has long been diverse (Frege and Kelly, 2003).

In presenting this report we do not have a view about the responses to these, and many other, questions about union purposes and policies. These are rightly the prerogative of the union members who, through their own democratic structures, are able to decide what they think are the right response to these questions for their own union.

Our argument is that whatever the outcomes being pursued, the common mission that unites all trade unions is that they exist to bring about change. Whether it be modest change, or radical change, education trade unions that seek improvements in working conditions and the quality of public education are engaged in a change process.

Our starting point therefore is to argue that trade unions need to understand change, and what drives it, in order to make change happen. This in turn requires unions to consider what power they have and to develop plans to build the power required to bring about change.

In this section of our report we think critically about change, and make the case for developing a specifically trade union focused 'theory of change'. We then consider how power shapes change, and what we mean by power. There follows a discussion of power in a union context and the importance of 'building union power'. We conclude by discussing the role of leadership in building union power and make the case for thinking about leadership in a trade union context in new and innovative ways.

Trade unions and change: developing an alternative theory of change

Within the corporate world, and in large public sector organisations, considerable attention is often devoted to 'change management'. The careers of many academics and business leaders have been built on

establishing reputations in this field. Global management consultancies have developed into huge corporations as they sell their services to private and public sector clients (often leading to a blurring of the private-public divide).

One key element of this ‘change management industry’ is the development of work that is presented in the form of a ‘theory of change’. Described by Goldsworthy as ‘an explicit process of thinking through and documenting how a program or intervention is supposed to work, why it will work, who it will benefit (and in what way) and the conditions required for success’ (2021, p. 1), and she goes on to state that it sets out the strategies, actions, conditions and resources necessary for achieving a successful outcome.

Theories of change, in their various forms, have achieved a ubiquity across commercial, government and civil society organisations such that they are commonplace in very diverse contexts. For example, the United Nations Development Group established its own ‘Theory of Change’ (UNDAF, undated) asserting that:

A theory of change also helps to identify the underlying assumptions and risks that will be vital to understand and revisit throughout the process to ensure the process will contribute to the desired change. (p. 4)

At times it can be easy to be dismissive of much of the work presented as a ‘theory of change’. At its worst it is simplistic, devoid of contextual understanding and it fails to problematise key issues. Much of the work is located in what is described as a ‘unitarist paradigm’ (Burchill, 2014) in which employers, managers and employees are all assumed to have common interests. Theories of change often highlight the need to ‘engage with stakeholders’ but this is typically to

persuade those considered antagonistic to the change to convert to become supporters. Trade unions may sometimes be considered as ‘stakeholders’ and therefore be included in consultations, but employers also use methods to consult with staff beyond the union, and these can be used to undermine trade union responses. The aim is often to neutralise potential opposition. There may be some willingness to adapt ideas in response to consultation, but the basic aims are typically not open to contestation. The spaces for debate are around small details, not fundamental principles.

Given the above points, and oftentimes the reality of being drawn into change management processes that trade unionists experience as bureaucratic efforts to incorporate them, it can be tempting to reject any discussion of theories of change as management tools that are seldom helpful for trade unions. There is also a common tendency to dismiss ‘theory’ as something disconnected from real world experience. This view is mistaken. Theory helps us to understand a phenomenon so that we can influence it. A theory of change helps us develop a deeper understanding of change – in order to be able to make change happen. Theories work best when they have an *explanatory power*, that is they help to understand why things are as they are, as a precondition for considering how they might be different. In order to change the world, it is first necessary to understand it!

However, as Holgate and Page (2025) assert, a theory of change grounded in a trade union perspective needs to reflect the values, purposes and experiences of the trade union movement. It is based on a very different set of premises to the orthodox theories of change to be found in management text books.

An alternative theory of change rejects the unitarist organisational paradigm with its assumption of shared interests between employers and workers, and recognises that

the interests of employers and workers are often in tension. There may be particular instances where interests align (for example, when education sector employers and trade unions combine to lobby government for additional investment), but commonly the interests of the employer and the worker are in conflict. It is important to recognise that the employer's focus is on getting the work done (ie securing the 'output'). The worker may be one of the resources necessary to secure the output but if the work can be completed without the worker, and at lower cost (for example by a machine), the employer has no interest in the worker. Employer interests and workers' interests are not the same.

This analysis places the concept of interests, whether in conflict or shared, at the heart of a trade union theory of change. However, the term can be difficult to explain in a way that provides conceptual clarity and theoretical utility. At its most general 'interests' refer to something that is able to bring tangible advantage, or, more vaguely, generates a positive emotional state, such as improved well-being (broadly defined). The concept is important, because it links decisively to motivation, and a willingness to act – either to advance one's interests, or to defend and maintain existing interests (being threatened by erosion or diminution). However, the critical link between 'interests' and any commitment to take action is provided by the cognate concept of (in)justice. When the need to advance or defend one's interests is rooted in a sense of (in)justice, then the motivation to take action is enhanced. Indeed, when there is a connection made between interests and (in)justice it becomes possible to imagine taking action not only to advance one's own interests (referred to as 'vested interests'), but also to protect or advance the interests of others. This of course is the basis of one of trade unionism's foundational values – solidarity.

Understanding the relationship between interests and action is central to understanding why the concept of interests must lie at the heart of any theory of change. It is a relationship explained with great clarity in John Kelly's (1998) exposition of mobilisation theory which seeks to explain when, and under what circumstances, a given set of conditions are likely to lead to collective actions. As Kelly asserts, interests are 'the fulcrum [core] of the model' (p. 25).

In this report we provide two ways of thinking about 'interests':

- **Material interests** – are considered tangible manifestations of factors that make a visible and practical improvement towards quality of life. The range of issues included is extremely diverse and might include any factor that has an impact on living standards. In a specific work context material interests might relate to all those factors broadly referred to as working conditions, including pay, working hours, work intensity.
- **Ideational interests** – relate to those factors concerned with values, purposes and attitudes. In this way, ideational interests are those relating to ideas and thoughts about aspects that are not immediately experienced by the senses. Ideational interests are advanced when there are developments that align with beliefs and values, and they are undermined when the reverse applies. Ideational interests include ideas and attitudes relating to social justice, equality and democracy.

In some traditions the interests of workers are seen as objective, and existing external to the worker. It is claimed that worker interests are related to their location in the social structure, even if the worker does not necessarily understand the issues in this way. These approaches tend to emphasise the importance of material interests. By contrast, other traditions argue that a worker's interests can only be defined by the worker themselves. This tradition sees interests as more subjectively formed, and may emphasise the importance of ideational interests.

In this report we see these two elements acting in a dialectical relationship with each other. Material interests are clearly crucial, but they do not exist outside of a context in which workers have to *make sense* of their material reality. This in part requires workers to form ideas about their material experience (understanding their material interests, how they are formed and how they are being challenged), while also forming ideas about issues that are not so obviously linked to their material interests. In this sense 'interests' are both rooted in an objective material reality, and they are socially constructed. Each interacts with the other in a reciprocal and dialectical relationship.

Interests may be defined individually, but also collectively.

In conclusion, we are arguing that any theory that seeks to explain change must start by seeking to understand how change is driven by the competing interests of different social groups. How does any change (social, political, technological) reflect the interests of particular social groups? Whose interests are advanced, and whose interests are threatened? Where do the interests of different social groups overlap, and what opportunities exist to align and/or reconcile different interests? Change processes, whether the political programmes of governments, or a new policy adopted in an individual school, are shaped by the dynamics of the struggle over competing, and

oftentimes, conflicting interests. What the outcome of this struggle will be will depend in large part on the balance of power between the different protagonists in the process. Hence the need to develop an understanding of power as an essential element of a theory of change.

Power as the engine of change: Building union power

Within the natural sciences, the notion of power is well understood, and the analytical tools used to understand it are widely shared. Combinations of force and velocity allow physical manifestations of power to be quantified, measured and calibrated. In studies of the social world the issues are more complex. In every day discourse the term can be regularly used, and rarely does the meaning have to be explained. However, to be able to use the concept as a meaningful analytical tool more specific questions need to be addressed which focus on the social practices of domination and resistance.

One approach to understanding power within the political sciences has been to focus on the ability of one party to enforce an outcome on another party that otherwise would not prevail. The argument being made is that power can only be 'tested' when it involves producing an outcome that is otherwise resisted (Dahl, 1957). This is clearly an important element of power, with some sense that power is made visible, even if it remains incalculable with any precision. However, this approach to identifying power rather oversimplifies the concept as power is reduced to displays of force, and the overcoming of resistance. In this sense power is conceived as coercive. An alternative approach, provided by Bachrach and Baratz (1962) extended the notion of power beyond the narrowly coercive and argued that power is the ability to determine what issues are legitimate areas for discussion, and therefore

potential contestation, while simultaneously being able to preclude other issues as beyond being discussed. This may be described as the power to 'set the agenda' and to therefore determine the rules of the game. For example, an employer may be able to invoke the law to argue that a particular issue is not a legitimate issue for collective bargaining. The employer clearly has the power in this instance, which can only be challenged by the union if it seeks to challenge the law. This is of course possible, but it is typically a high-risk strategy with the balance of power lying with employers and the state.

In turn Steven Luke's developed this analysis further when he presented a 'third dimension of power' (Lukes, 1974) which he identified as a form of domination involving the ability of one party to secure the active support of a second party, even when, objectively, it is not in the interests of the second party to do so. In this instance, it is not necessary to enforce, impose or coerce because the subordinate party actively seeks the same objective as the dominant party. This is a power rooted in what Lukes describes as the 'shaping of the universe of possibility' (Lukes, 2021). It goes beyond mere agenda-setting (which may still require elements of imposition and coercion) because it has effectively framed the reality so effectively that contrary opinions are typically regarded as aberrant and dismissed as irrelevant.

In this report Luke's framework is not presented as a definitive theory of power, but rather as one approach that illustrates how power works both coercively (through force, imposition and the threat and use of sanctions) and consensually (through support, legitimation and the 'normalisation' of the everyday). As such it builds on several traditions that have emphasised domination as combining both coercion and consent, and which are often at their most robust when consent can be considered as deep, and the need for coercion is limited.

Before discussing these ideas in a trade union context, it is important to make two important clarifying points. Firstly, the construction of consent, which may be against the objective interests of a particular group, does not imply some sort of conspiratorial mind-bending of the masses by a shadowy elite, but rather refers to the extraordinarily complex ways in which myriad institutions (media, education, state services, religious and faith bodies) function in ways that construct what Antonio Gramsci (1971) referred to as a 'common sense' – an every day logic that reinforces a view of the world as it is, and apparently without an alternative. This common sense is largely formed by institutions that reflect the interests of the wealthy and powerful (see media ownership, or the influence of elite private schools and universities), but the processes by which this common sense is embedded are complex and messy. Secondly, and following from this argument, the concept of common sense, constructed through the institutions of both political and civil society, serves as a reminder that this common sense can be challenged – it is open to contestation. It will inevitably reflect the values, norms and interests of dominant groups, but it can be critiqued, challenged, disrupted and displaced. Power is not uni-directional, flowing from the top to the bottom, but dominance can be challenged. There is agency to resist.

Understanding power in this way is essential for those who seek to enable change, like trade unions, because without a ‘theory of power’ to complement our theory of change, it becomes difficult to adopt the strategies and tactics that can make change happen. As Holgate (2021) asserts:

If workers are to enter a new era of labour power, they will need a much deeper understanding of the conceptualisation of power and its different forms – only then will they be able to adapt organising tactics and strategies that utilise this power to win their demands. (p. 19)

In this report we understand trade union power as a function of two elements. The first relates to a set of contextual factors that are typically not in the control of the union, but which provide either favourable or unfavourable conditions for unions to exercise the power they have. These typically include factors such as prevailing economic conditions, the labour market (generally and sector specific), product markets, political conditions and the strategic importance of groups of workers within the economy or within their own organisation. Within any organisation efforts by employers to individualise the labour process are intended to intensify worker against worker competition and undermine the employee power. All of these factors can be described as determining the terrain on which unions engage in their struggles. The strategic challenge is to navigate this terrain in a way that capitalises on favourable factors (and amplify union power) and mitigates for unfavourable factors (those that undermine union power).

The second dimension of union power relates to those factors that are within the union’s control – at least to a point. Broadly this

relates to the union’s ability to mobilise its resources in such a way that the employer concedes to union demands, characterised by a set of circumstances where *the employer is forced to say yes, when they want to say no*. This mobilisation of resources takes the form of collective action capable of generating the pressure required to force the concession. It has both quantitative and qualitative dimensions. In quantitative terms union power is intimately linked to levels of union membership, although a more sophisticated analysis also requires a focus on union density (the proportion of eligible employees who are union members). Density is often considered a more useful indicator of union power as density in turn links to the ability to deliver impactful industrial action. A strike that is maintained by the whole workforce might be expected to be more effective than one where action is taken by a fraction of the workforce. Union membership, membership density, the prevalence of forms of industrial action and other indicators (number of union representatives, the extent of collective bargaining coverage) can all be considered as proxies of union power, but it is important to consider these issues with some caution. Kelly (1998) has pointed out that there is not always a clear relationship between these proxies and the extent of union victories (the most visible evidence of union power).

The complexity of the relationship between these quantitative proxies of union strength and visible manifestations of union power highlight the importance of understanding more qualitative elements of this relationship. It is the case that the act of joining a trade union demonstrates some level of commitment to collective organisation, but within the union’s membership there may be a wide range of views about what it means to be a union member. Where a union member has a clear understanding of the role and purpose of the union, then it is more likely that commitment to the organisation is stronger and the worker sees being a union member as an important part of their identity as a worker. In this case we speculate that

such workers will be more likely to participate in union-related activity, they will be more likely to abide by union decisions, and they will be more likely to engage in industrial action if required to do so. Conversely, where commitment is weak and tenuous it is less likely that such a member will participate in union activity, including in industrial action. Hence, a focus on the quantitative proxies of union power is not enough if there is no recognition of the qualitative dimensions. Commitment and a sense of union identity (referred to as ‘unionateness’ by Bascia and Stevenson, 2016) are critical if passive members are to become active agents in union campaigns.

Our argument about these quantitative (membership, density) and qualitative (union identity and commitment) dimensions of union power is that they are, to a point, within the control of union activists – the union cannot impact macro-economic conditions in any direct way, but union activists can recruit more members, and can deepen the commitment to the union among those who are already members. Holgate and Page (2025) argue that this is how union power is built – by converting the latent power that resides within the workforce (who may or may not be in the union and are largely passive) into a real power expressed through union membership and a commitment to take action in pursuit of agreed goals. The transformation of latent power into active and real power, rather than the reliance on power that already exists, is how Holgate and Page distinguish between organising and mobilising.

One way to think of the distinction between organising and mobilising is that mobilising is the utilisation of power resources already available, whereas organising begins by asking where the latent power is that needs to be activated to effect change. Strategic organisers then figure out a plan to systematically build that power and develop the resources needed to win. (pp. 78-79)

We believe this distinction between ‘organising’ and ‘mobilising’ is important because of the emphasis it places on a set of activities that specifically aim to build capacity in the union - recognising that the power resource already exists within the workforce. The challenge is to transform latent (potential) power into active (realised) power – not by relying on a combination of hope and alchemy, but by developing a sustained, strategic approach to building union power.

Holgate and Page’s distinction between mobilising and organising highlights the importance of making a conceptual separation between these two activities. The two should not be counterposed as mutually exclusive, but recognising important differences is key to ensuring the correct strategic choices are made. The debate over methods continues to be dogged by some confusion, and in the following section we set out the key issues.

Organising: the key to building union power

Union renewal strategies have typically gone hand in hand with a focus on ‘organising’ as an approach to union building that emphasises worker self-activity. The word does not always readily translate into different cultural contexts, with the term long associated with union building strategies adopted in North America. It is also linked to community contexts (Alinsky, 1971) and the historic campaigns to win civil rights. However, despite some of the challenges of cultural and contextual transferability it is important to recognise that despite these historical and cultural differences ‘trade unions in very different national contexts are converging towards similar strategies of revitalisation’ (Ibsen and Tapia, 2017, p. 171), and these broadly reflect what can be described as an international ‘turn to organising’.

Although it can be argued there are several core features of the various approaches to, and interpretations of, the term ‘organising’ it is also important to recognise where there are differences, and these nuances can help finesse the application of organising approaches in different contexts.

The US activist and scholar Jane McAlevey, together with her collaborators, did much to popularise the notion of ‘organising’ as the key to union building, and indeed the huge educational programme that McAlevey helped develop was titled ‘Organising for Power’ and her widely cited book ‘*No Shortcuts*’ (McAlevey, 2016) was strap-lined with the same title². In ‘*No Shortcuts*’ McAlevey distinguishes between three distinct union strategies:

Advocacy – refers to strategies that seek to make progress based on some notion of ‘rational argument’. Those involved in trying to bring about change are typically few in number and often occupy privileged positions within organisations either as staff, or as elected representatives. In this approach a ‘case’ is made for change with those involved drawing on the most effective arguments, and often the use of evidence. Sometimes the skills of ‘advocates’ are quite specialist – with a strong emphasis on professional lobbyists, campaigners or pollsters. Building popular support for change is not ignored, but there is no sustained effort to turn such support into pressure that can drive change where those with power seek to retain the *status quo*. There is an assumption that those in power can be persuaded by logical argument, and that they act in the interests of the majority. Beyond the core group of advocates, wider popular/member participation in these campaigns is absent, indeed it may be discouraged.

Mobilising – recognises that those with power will not willingly relinquish their power, as to do so threatens their own vested interests (existing control of material and symbolic resources, and access to resources of power that protect and maintain these interests). Mobilising seeks to shift this imbalance of power by drawing people into activities that reconfigure the power equilibrium. Mobilisations can take many forms, and they work in very different ways. Arranging a petition that gains huge numbers of signatories involves people taking a defined action (signing the petition) that in turn places a pressure on those with the power to make change. The petition acts as a signifier of ‘public opinion’ and defying public opinion carries risks (a business may fear losing custom, while politicians risk losing support and electoral defeat). Other actions, such as a strike, threaten a more obvious and material impact. For example, a commercial organisation faces an immediate loss of income, and therefore an impact on profit.

² Jane McAlevey died in 2024, but the Organising for Power initiative continues at <https://www.rosalux.de/en/o4p>

This approach to union strategy recognises the need to bring pressure on employers to act in ways that they will not see as in their self-interest (to compel employers to say yes, when they want to say no). However, although those taking action by definition take an active role in the process (by signing the petition, or taking the strike action) they do so in ways that limit or restrict their participation. Those taking the action are treated as objects with little meaningful involvement in real decision-making and shaping the actions. Meanwhile, the subjects are those who decide what is done, and when. It follows that there is a sharp distinction between a core group of 'leaders', and a much larger mass of 'followers'. The latter group are essential to conveying a sense of power (because numbers are often central to mobilisations) but their role, in fundamental respects, remains passive. Followers are simply expected to respond to requests/instructions while power, within the campaign, resides with the campaign's leaders.

Mobilisations are important – because when building pressure for change, numbers matter. And it must be recognised that there will always be individuals who will be content with a largely transactional approach to participating in a movement for change. For these reasons mobilisations always have a role, and their importance should not be diminished. However, the problem is that a strategy of mobilisation alone is not sufficient, and it is certainly not sustainable. Mobilisation assumes a mass of followers who are ready and willing to take actions as determined by others. The obvious challenge arises when followers are not willing to take the action being asked of them. How, and under what circumstances, can followers be convinced to shift from their passivity to action? What is the change process that needs to take place, and what makes it happen? A related problem is that if those being asked to take action are not genuinely involved in the campaign then their commitment will be correspondingly transactional and superficial. The risk is that

participation is fickle, and can easily diminish if advances are not secured quickly.

Organising – is based on an understanding that those in positions of power need to be compelled to act in ways that they would otherwise resist, because of the threats to their power, status and privilege. In this sense, it shares assumptions with the mobilisation approach that change requires a rebalancing of power relations if those who benefit from the status quo are to make concessions. However, the organising approach reflects a very different set of assumptions about how power is built. Organising approaches reject the sharp distinctions between leaders and followers (or between 'activists' and 'members' in a trade union context) and focus on the ways participants can be drawn into activity, in part through maximising the opportunities for genuine participation in decision-making (Simms et al. 2013; McAlevey, 2019). The focus of the campaign, and the strategy intended to achieve success, are not matters that are determined by small groups of activists, but rather they emerge from the active engagement of large swathes of members. Rather than being passive recipients of others' instructions, those involved become active agents in shaping their own context. The essence of the organising approach therefore is self-organising as those engaged in any campaign assume ownership of, and take responsibility for, how that campaign develops and decide when its goals have been met (Allinson, 2022).

The organising challenge is to make this happen. Organising approaches do not make the same assumptions about people's willingness to take actions, that can often underpin a mobilising approach. Rather there is a recognition that people often need to be persuaded that change is possible, and that they are key to making change happen. This assumption places the focus on leadership – but this is a very different form of leadership to that which is implicit in the mobilisation approach. Rather than a focus on leaders who are directive and transactional, an organising

approach is concerned with leadership that is distributed and transformative. It is a leadership that is less concerned with leading others than it is with developing leadership in others (Ganz, 2024). Elsewhere in this report we specifically refer to organising as a form of leadership focused on activating latent power.

This distinction between mobilising and organising can be very helpful when determining strategy, but the approaches are not mutually exclusive, and indeed there will be times when a mobilisation is entirely appropriate. It is never a simple case of 'organising = good / mobilising = bad'. There may be a particular set of circumstances when a mobilisation is a very pragmatic and appropriate response. However, it is typically not a long-term solution because a mobilising approach seeks to use resources of power without necessarily trying to grow resources of power in the way described by Holgate and Page (2025) above.

A similar approach to the above is presented by Hahrie Han in her book *'How Organizations Develop Activists'* (Han, 2014). Her particular interest is in the actions of those who do the work of advocating, mobilising and organising. Han distinguishes between 'Lone wolves', 'Mobilisers' and 'Organisers' and argues that at any one time it is often possible to identify examples of some or all of these approaches happening simultaneously and in combination. According to Han, lone wolves operate in isolation, even when they are part of membership organisations. They characteristically work exceptionally hard, although they often encourage a dependency culture in which largely passive members are expected to defer to the leader, who acts on their behalf. Power is developed through the acquisition of knowledge, expertise and experience, which is then used to try to gain credibility, and influence, with decision-makers. Progress might be achieved, but it is seldom progress that was not willingly conceded by those in power. Any change that has taken place, has typically taken place on terms determined by those with power.

A lone wolf does not *build power* in any meaningful sense because by definition, in this approach, power resides in an individual. Indeed, lone wolves often diminish power because they de-motivate others in the organisation who may otherwise be willing to take on responsibility. At its worst, when a dependency culture is created, power can be hoarded by an individual who maintains this position in order to protect their own existing advantage (status, or access to resources). When this occurs, the real danger is that the wider organisation atrophies as other members feel deterred from becoming involved.

For Han the key distinction between mobilisers and organisers is that the former are transactional, while she describes the latter as transformational. In mobilisation approaches the transactional calculation is balancing the benefit to be gained (the win, or potential win) against the effort to be expended (time and energy devoted to the action). Mobilisers seek to engage people to take action, but a feature of the mobilising approach is that efforts are often taken to minimise the commitment required. For example, people may be encouraged to contact their representative in their legislature on an issue by providing them with a template email that simply requires them to add their own details and then press 'send'. A huge volume of correspondence is clearly intended to convey strength of feeling, as a manifestation of power, but the legislator may well be dismissive of a template correspondence, while the individual taking the action has been coaxed to do so by minimising the commitment required. This example, highlights the limitations of such an approach. Han is clear that such actions have their place, and in her empirical study of several organisations, Han argues that high engagement organisations combined both mobilising and organising approaches, but that mobilising was not sufficient on its own. Han argues that real change becomes possible when an organising approach is adopted that is transformative of individuals, because

it is built on individuals acting collectively. According to Han organising approaches draw individuals into leadership by developing networks of leaders, transforming not only the individual, but the collective itself. As Han (2014) states:

Organizers bring individuals together in a way that creates a collective capacity not present when individuals act alone. Organizers do not simply aggregate individuals but also create new relationships between them that generate new commitments and resources. (p. 14)

Han identifies three aspects of the work of organisers that distinguishes their activities from mobilisers. First, there is a focus on developing autonomous activity in which those participating experience a genuine sense of agency in relation to the campaign they are engaged in. Second, there is a commitment to build communities of activists where power is distributed and horizontal networks are formed. Finally, there is a focus on intentional activist development through actions such as training, coaching and mentoring. In Han's view, all these actions build power, rather than simply trying to utilise existing power, and as such they are positioned in contradistinction to the actions of those engaged in mobilising.

Han's focus on lone wolves, mobilisers and organisers remind us that this is work undertaken by people, acting in real world contexts. 'Organising' is not an abstract concept that just happens, but it is a verb – it is *what people do*. Indeed, it is what people do, specifically, to build the collective power that brings about change.

In this report, we refer to acting with intentionality to engage with others to build power to bring about change as leadership – whatever that change may be. It may be

change at a national or even international level, but it may equally be change that happens in an individual workplace, or possibly a single department within a larger workplace. Those engaged in these change processes are leaders. The important conclusion that follows from this analysis is that leadership is a practice – not a position.

In the final section of this conceptual mapping we take the ideas presented thus far and begin to apply them to the notion of leadership (rather than, more narrowly, only thinking about 'leaders').

Re-thinking 'leadership' in trade unions

All the ideas presented so far in this report point to the importance of those who act as leaders, and arguably more critically, the central role of 'leadership' (as a practice, rather than as a position). In previous sections we argued:

Leadership is acting with intentionality . . .

to engage with others . . .
to build union power . . .
to bring about change.

In this sense, it can be helpful to distinguish between 'leadership', with its focus on change, and 'management', with its focus on maintenance. Management is concerned with making sure that everything functions as it should – that, other things being equal, the status quo is maintained. This can be vital work, and should not be diminished, but it is important to recognise that it is not leadership – which is focused on bringing about change, whether it be within an organisation, or through an organisation. Adopting this distinction reminds us that it is possible to be a senior figure in an organisation, and sometimes referred to as a leader, but to not be engaged in leadership. Similarly, it is

possible to working in an organisation and to not be formally identified in any way as a leader, and to still be engaged in leadership.

In this report, with our sharp focus on renewal (which is, by definition, a process of change) our interest however, is in those who practice leadership, or who can be developed to become leaders in the broadest sense.

In this report we group leadership practices into three ‘capacities’ – strategic, educative and relational.

Strategic leadership:

The concept of strategy, and the notion of strategic planning, is generally well understood but this does not mean strategic approaches are widely practiced, let alone executed effectively. Despite a recognition of the importance of strategic planning many organisations cannot be described as having a coherent strategic plan, and even when change is carefully planned it is well understood that many change programmes fail – not only wasting resources, but often setting organisations back in terms of their development.

There is no single way to consider a strategic approach as much will depend on organisational context, but it is widely recognised that there are a relatively small number of core components.

- A sense of purpose – this combines a broad sense of the organisation’s fundamental purpose (what does it exist for? what does it want to achieve?) with a set of strategic priorities identifying short, medium and longer term goals. The organisation’s fundamental purpose, and its short to long term goals, should obviously align, cohered by the organisation’s core values.

- An appreciation of current location (in terms of understanding current capacity) – put simply, where is the organisation now? This requires a transparent, and candid, assessment of organisational strengths and weaknesses, based on evidence rather than hunch. It allows the organisation to begin the process of planning through an honest assessment of current resources and capabilities. Depending on what that assessment looks like will necessarily impact the strategic choices available to the organisation.
- A plan, or plans, formulated to achieve the agreed objectives – the process of translating goals into practical actions with clear timelines, milestones, responsibilities, accountabilities and with resources clearly identified and allocated.

There is always a danger that strategic planning, as presented above, looks like an extract from a mainstream Business School textbook intended for aspiring CEOs. But this should not be a justification for dismissing the approach, but rather a call to take these core principles and develop them in a trade union context, recognising the distinctive features of a trade union organisation. For example, as with theories of change discussed earlier, much of this work assumes a unitarist paradigm, that is that there is largely agreement over purposes and values, and dissent is dismissed as aberrant. In contrast, trade unions are democratic organisations in which a wide range of views are held, and articulated. Therefore, trade unions, rightly, need to think differently about how they use the union’s democratic structures to develop long term plans that have wide support across the organisation. But it would be naïve, and mistaken, to assume this is straightforward. A wide range of different interests exist within trade unions (material, ideological and symbolic) and these will often emerge in

competing visions of what the future should look like, or indeed over the fundamental purposes of the union. This is not a problem, indeed it is often a strength, but it can make the development of strategic vision, based on popular support, more complex.

In this way, we might consider this as the core task of leadership. Marshall Ganz (2009), writing about leadership in trade unions and social movements, describes strategic leadership in the following terms:

Strategy is how we turn what we have into what we need to get what we want. Strategy is intentional – a pathway that we shape by making a series of choices about how to use resources in the present to achieve goals in the future. Strategy, thus, requires the courage to venture into the unknown, risk failure, say no to current demands and commit to a course of action that we can only hypothesize will yield the desired outcome' (p. 8).

For Ganz strategic leadership involves taking on responsibility for making strategic choices – as leaders seek to navigate the terrain on which they are forced to function. The structural context defines the environment within which those making decisions must operate, but this 'terrain' does no more than determine the parameters for making decisions. Even within these constraints, there is scope for agency and leadership may in part be considered as the ability to identify the spaces to exercise agency and then to exploit this agency to the full.

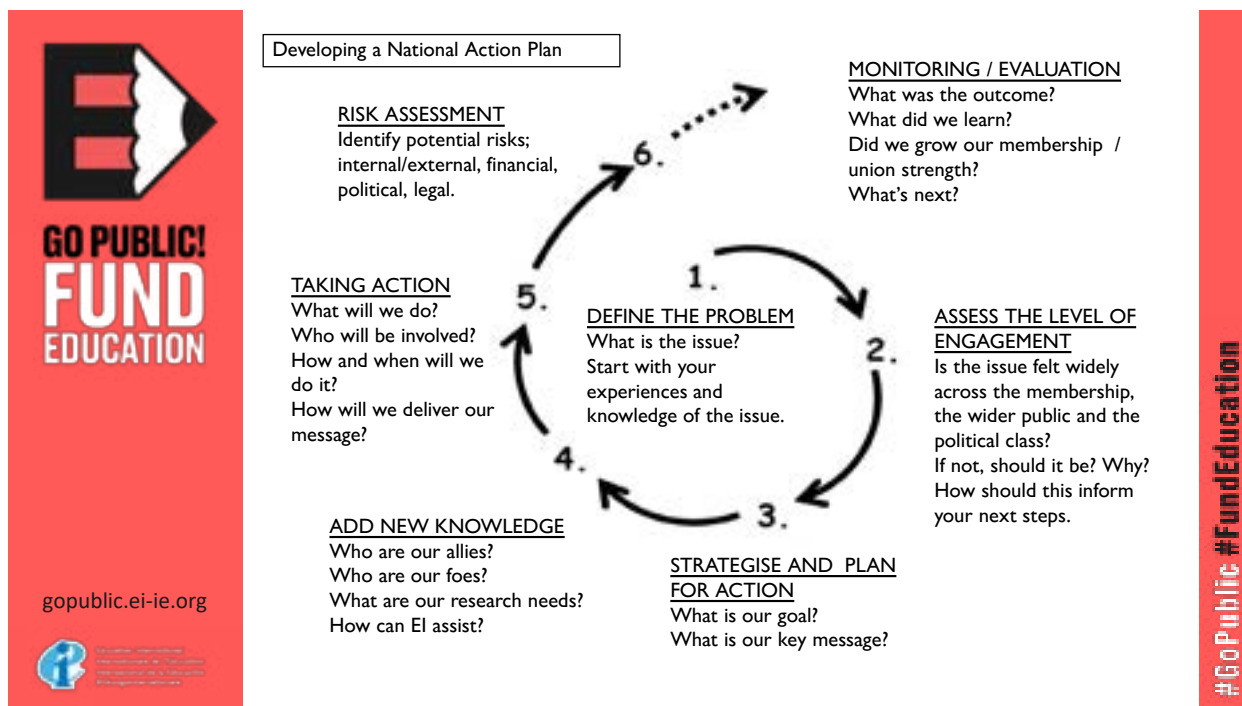
Central to Ganz's strategic approach is the ability of leaders to build 'strategic capacity', which in turn contains three elements.

First, Ganz highlights motivation and argues that purpose and commitment are foundational to being willing to make the necessary strategic choices, recognising there is no certainty and choices carry risk. Without sufficient motivation, leadership is replaced by paralysis and inertia. The challenge for strategic leaders is to be able to articulate a narrative about purpose and values that can engage and motivate others. In his work Ganz places considerable emphasis on the development and articulation of narratives as a key means to communicate to a wider mass.

Second, Ganz identifies the importance of 'salient knowledge', recognising the essential role played by possessing both necessary skills and knowledge. For Ganz, the distinction between skills and knowledge is important because, although qualitatively different, both are essential for any serious change process. The details of the skills and knowledge required will vary according to context, but a commitment to strategic leadership recognises what skills and knowledge are required, and how to develop them where they may be deficient.

Finally, Ganz emphasises the importance of reflection as strategic leaders are required to consider past experience in the approach to tackling new and novel problems. All change within organisations exists to address a problem (how ever, and by who ever, the problem has been defined). Such problems do not exist without a history and Ganz places considerable emphasis on the ability to learn from the past. This necessarily requires reflection, but reflection is limited in its impact if it is individualised. Ganz emphasises the need for reflection to be a collective process, in which all those able to contribute are involved. Such collective reflection on the past is considered critical to supporting more effective strategic decision-making about the future.

One illustration of what this can look like in a trade union context is exemplified in the tool provided by Education International to support its *Go Public! Fund Education* campaign.



Source: Education International

Here the model encouraged by EI identifies a set of processes intended to develop a coherent and sharply focused approach to change.

Educative leadership:

Building union power involves galvanising the union’s membership to take collective actions (in whatever form is considered most practical and effective) to compel employers to address union demands. However, if unions seek to change how people act, they must first change how people think – because thought precedes action. For example, below are a series of actions that unions commonly aspire to.

- A non-member joins the union
- A passive union member (who pays

only their subscription) participates in union activities (votes in union elections, attends union meetings)

- A union member starts to actively engage in the union – taking part in regular activities and helping the union branch to function
- An activist union member takes responsibility for drawing others into union action.

All of these actions can be considered as individual transformations, as passivity is transformed into increasing activity. However, it is important to recognise that the shift in action is made possible by an initial shift in thought – ‘what I do is determined by what I think’. There may be many factors that contribute to the shift in thinking – including, for example, developments in the wider

economy or society that are far beyond the control of the union. That said, any shift in thinking is a *learned response*, that is, it is pedagogical, and it is possible to shape this learned response through human action and intervention. In this sense leadership that is transformative must always be, in essence, educative. As Stevenson (2024) has asserted:

There can be no change without leadership, and there can be no leadership that is not educative. (p. 158).

Transformational change is achieved by building union power, expressed through the collective action of union members. That only becomes possible when workers develop their own understanding of what is wrong with the prevailing situation, why it is like it is, how it might be different and, crucially, understanding their own role in bringing about the necessary change. This involves a shaping of workers' ideational interests.

In this context the concept of consciousness can be helpful. Consciousness may be considered, at an elementary level, as the way in which one makes sense of the world. Each of us has a conception of the world – why is the world as it is? Might it be different? What is my place in the world? Who shares my experiences and interests? Is change possible? How can change happen, and what is my role in bringing about change?

There are seldom common or coherent answers to these questions. Antonio Gramsci (1971) referred to 'contradictory consciousness' (p. 197) whereby individuals' 'conceptions of the world' are formed by multiple experiences and sources, often developed as a form of *bricolage* comprising many different elements. As Gramsci's language implies, different elements of this 'sense making' may even be in conflict with other elements. Nor is this 'consciousness' stable – people's conceptions of the world will shift as external influences shift – political,

economic, social factors are all in flux and in many cases powerful interests are actively intervening in order to generate particular outcomes. As indicated earlier, control of the media represents a consummate example of such interventions, but there are many other influences.

Educative leadership describes the actions of those who actively develop a 'counter-consciousness' that challenges dominant ideas, and the 'common sense' that normalises the *status quo*. The development of a counter-consciousness requires an active intervention that connects individuals' everyday experiences with the construction of an alternative that is capable of addressing, and transcending, the problems and contradictions people experience in their lives. We conceive of this as a pedagogic intervention in which people *learn* that the world as it is, is not an inevitability. Not only are people able to identify and understand the injustices within current structures, but they are able to recognise that another, better world is possible (Anyon, 2014). There is no such thing as '*there is no alternative*' – Margaret Thatcher's mantra used to convince people that seeking change was pointless. As has been argued, the 'common sense' that dominates popular thinking is not pre-determined and immovable but rather it is open to contestation – it can be challenged, disrupted and displaced. Furthermore, and central to the development of a 'counter-consciousness' is people's recognition of their own role in bringing about change. Indeed, a counter-consciousness is rooted in a theory of change that sees change resulting from a coalescing of shared interests, and the subsequent development of collective action.

This analysis is grounded in a model of change that recognises the need to shift the thinking of others, and it explains why leadership is always, fundamentally, educative – emphasising Stevenson's point that 'those who act as leaders must be educators, even if not all educators are leaders' (2024, p 166).

Relational leadership:

Relational leadership recognises that the relationship between those engaged in leading, and those who might be identified as followers, is central to making change happen. The underpinning assumption is that messaging and communication cannot be divorced from a deeper relationship between both parties. Arguments that can shift thinking are not purely rational, and capable of being detached from the source of the message, but rather the credibility of the message source is of critical importance.

It is possible for organisations to build a strong relationship with members, and those in traditional leadership roles (ie those who are senior in an organisation and who have high visibility by virtue of a spokesperson role) can also build strong connections with grassroots members and those beyond the organisation. However, there is clear research evidence to indicate these relationships are potentially at their strongest when the relationship that exists, or that is being constructed, is between people who have immediate and direct contact.

Arguably the key characteristic of relational leadership is the notion of trust, which can assume many forms. For example, one aspect of trust depends on perceptions of ability and competence (*'I trust you because I know you are capable of doing a good job'*), while other aspects include integrity and authenticity (*'I trust you to be honest'*). Another important component of trust is the notion of reliability and dependability (*'I know you will do what you say you will do'*), but other factors include general respect and perceptions of courage (*'I know you will stand up for me'*). It is also important for people to believe that a leader's motivations are driven by their own interests, but rather the interests of those they represent. Put simply – *'I know you care'*.

These types of issues do not always feature in trade union discourse, but there is considerable research evidence from other

disciplines that relationships in general, and trust in particular, are key features of those identified as effective leaders. Within a trade union context this was acknowledged by Jane McAlevey (2016) when she argued that the most effective workplace leader (who she identified as an 'organic leader') was the person who was respected and trusted most by colleagues. This may not be, and frequently was not, the union representative. Indeed, McAlevey argued that the organic leader may well come from outside the union (within the project case studies see the example of *Pedagogusok* in Hungary where this is illustrated).

Given the focus on relationships, and the reliance on connections and trust, then such people are well placed to have the type of in-person, and one-to-one conversations that are effective in shifting thinking and securing commitments to action. This type of dialogic activism (the ability to talk, communicate, persuade) is at the core of educative leadership and the over-lapping nature of educative and relational leadership is clearly illustrated here.

Indeed, the notion of educative leadership described above necessarily highlights the importance of human relationships as a basis for bringing about change. Pedagogic change, rooted in dialogic engagement, is never a purely technical process devoid of the emotional and relational factors that underpin it. Rather leadership depends on a relational engagement that is foundational to building support, trust and credibility. Some may describe this as a focus on emotional intelligence (EI), and indeed many studies have demonstrated the links between the possession of 'emotional intelligence' and effective leadership. Although there are many perspectives on the relationship between EI and effective leadership a useful starting point can be Goleman's (1995) early contribution, focusing on:

- Self-awareness – ability to understand one’s own emotions, values, beliefs and impact on others.
- Self regulation – ability to control disruptive emotions and respond to changed circumstances
- Motivation – drive to achieve
- Empathy – ability to consider the feelings of others
- Social skills – skills required to collaborate, communicate, manage potential conflicts.

Endpoint: Link leadership - building a leadership that is close to the members

In concluding this conceptual map we have highlighted the importance of thinking critically about leadership in trade unions – not as a position of seniority, but as a set of social practices that are concerned with bringing about change. Seen in this way leadership must be distributed and exercised at all levels of the trade union. However, our specific interest, with our sharp focus on renewal, is in those leaders who are closest to workers in their own workplace. Posed simply, for the union member (or indeed the worker who is not et a member) at work in their school or college, who does that person ‘see’ when they see ‘the union’. Literally, what is the proximity of the union to the worker?

Is the person who represents the union someone the worker knows because they are a colleague, or is it someone more distant? How distant?

We are suggesting that a key ‘leadership’ figure in a union is the person who a member sees as ‘the union’ when they look towards the union, literally and figuratively. In reality, this person becomes the link between the worker and the union. Indeed, because of this

role we use the term ‘link leader’ recognising that in different unions, in different contexts these people will have different titles, roles, methods of organisation and expectations. However, the commonality is that the link leader, or perhaps link leadership, is the work undertaken by union representatives who can be considered as providing the organic connection between workers in their workplaces and the union (Fairbrother, 1996).

In this project the case studies illustrate that in some instances these link leaders may have formal roles within their trade union’s structures. Within the union’s organisational structures there may be specified positions, and many link leaders will be located in these roles. However, in other cases these link leaders may occupy an ambiguous role in union structures with a complex mix of the formal and informal. In many cases these people may not consider themselves as a leader at all (Stevenson, 2016). This point was made clearly by Jane McAlevey (2016) when she asserted that those who are what she described as ‘organic leaders’ in the workplace (colleagues with high levels of peer credibility, and considerable workplace influence, capable of galvanising their colleagues into action) are not only not always in the union, but they may even be antagonistic to the union. The key issue is that if leadership is a practice, rather than a position, then what matters is what gets done – not the name given to the person doing it.

The role of the link leader is critical because to the union’s membership this person is, literally, the human face of the union. The key local leader is the person who makes the union ‘real’ to the worker in their workplace. The union ‘exists’, and so belonging to the union, having a sense of a union identity, becomes more likely. The union is not a remote entity that exists far removed from the daily lived experience of the workers, but rather the union is real, and something to which the worker belongs.

Research by Winchip and Stevenson (published in Little *et al.*, 2023) highlighted the critical role of the school union representative in the National Union of Teachers in England and Wales (which has since become part of the National Education Union). The study used a survey to understand member engagement and participation in the union by grassroots union members. In summary, the survey demonstrated that in schools where the union had a school representative then member engagement and participation in the union was higher. Where there was no school-based representative member engagement and participation in the union was lower. Having a school union representative (or not) was the only factor where the difference in member engagement and participation was statistically significant. Other factors (age, gender, size of school, primary or secondary) did not make a statistically significant difference. In this case, the school-based union representative appeared as a 'link leader' – helping to bind members in the school to the union.

Little *et al.* refer to the difference made by the school union rep as the 'rep effect', but they acknowledge that the original research only distinguished between schools with a union representative (54% of respondents), and schools with no union representative (46% of respondents). Little *et al.* conclude:

... in the survey ... a simple distinction is made between having a school rep and having no rep. In reality, some reps will be much more active/effective than others, but the survey did not allow for this qualitative differentiation. Here we speculate, hopefully uncontroversially, that where reps feel confident to take on a more active role, then the 'rep effect' will be correspondingly greater. Put simply, if reps make a difference, then more confident and active reps will make more difference. (p. 79).

Little *et al.* argued that when there is a workplace leader playing this role then union democracy is deepened. Not only is there a possibility of more serious workplace union organisation (for example meetings of union members at the school or college) but that these union representatives can become the organic link between the informal democracy of the workplace and the more formal bureaucracy of the union. They concluded that a union needs to relentlessly develop this level of leadership. Not simply recruiting more union representatives, but supporting and developing these people so that they develop the skills necessary to organise their colleagues as union members. This person is no longer simply acting as a messenger from the union to its membership, but is actively representing members' interests in the workplace.

In acting as a link between union members and the union the link leader contributes directly to building a stronger, more resilient union.

The work is obviously difficult, and when circumstances are not favourable, it can seem a very considerable challenge to recruit link leaders who are based in the workplace and who can play a key role in organising their colleagues. However, this is work that must be done, and indeed it is work that can be done. Little *et al.* quote the words of a school based union representative who only became the representative when a problem arose at her workplace and no other members were willing to take responsibility for tackling the issue. She had no previous intention of taking on the position. However, as problems at the school intensified the new school union representative began to organise the workforce. Union membership rose dramatically (from 15 to 35 members) and members took eight days of strike action as part of their campaign. The school union representative accepted that at the outset prospects for union engagement were not promising, but she concluded:

*If you can organise my school,
you can organise anywhere.
(quoted in Little et al. 2023, p.
66)*

Her reflections provide a powerful final point. It is a reminder that change is always possible, even if at any point in time we have not always found the right way to make it happen. Indeed, sometimes, when all seems hopeless, it is necessary to go back to the beginning and find another way.

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Appendix 3:

Individual trade union case studies

These six short case studies provide practical examples of what ‘link leadership’ looks like in practice, and how it might be further developed. The cases show the diversity of experiences and contexts. These examples are not offered as ‘ideal types’ and they also demonstrate why it is not possible, let alone desirable, to provide a template for others to follow. We are grateful to all the unions presented here for being willing and open to share their experiences in order to support the horizontal learning across unions that is important for renewal.

The case studies use the terms ‘local leaders’ and ‘key local leaders’ as this was the project language when the case studies were drafted. In the final report the term ‘link leadership’ was adopted. In these case studies the terms can be used interchangeably.

Case Study: Algemene Onderwijsbond - AOb (Netherlands)

Context:

AOb, the General Education Union, represents education workers across all education sectors in the Netherlands, from Early Years through to Higher Education and Research Institutes. The union has over 87,000 members and is a member of the Federation of Dutch Trade Unions (FNV). Within the union there are a number of specialist groups and committees representing particular sectors, for example primary and secondary education, and also distinctive branches of the NL system, such as members working in schools based on faith-based groups. AOb has a specific

group formed of younger members, known as the Green Wave. The different education sectors are represented within the union by Sector Boards, with each Board is linked to its relevant Assembly.

The industrial relations framework is well established with collective agreements enforceable through law. The system is often characterised as one that values collaboration between stakeholders and the union is well positioned within this framework and involved in co-partnership working. However, in practice there can be considerable tensions, and the union and its members face many challenges. Some of these issues are exacerbated by a school system that has several centralising elements (including collective bargaining over pay and working hours), but which also depends on very high levels of decentralisation. For example, schools are given a ‘lump sum’ budget and have complete autonomy on how to allocate resources. This can lead to considerable variation at the school level, including in relation to issues that are nationally negotiated. For example, working hours are the outcome of national negotiations, but local decision-making can have a considerable impact on actual workloads experienced by teachers in different schools.

The political context has been framed by various coalition governments, but a constant that has been consistent across all governments has been a commitment to austerity-based economics and attacks on public spending. Against this background the union has secured some significant successes – including a 10% pay rise in the period after Covid-19 and the closing of the deeply divisive pay gap that existed between primary and secondary teachers. However, the central issue for teachers is less about pay, and more about workload. One union official made the following observation:

For the first time in years, for our members, pay is not the main issue. Inflation is rising but we have a 5% pay rise this year, and won 10% after Covid. The biggest problem is workload – workload, workload, workload and workload! The contact hours in secondary schools are very high – and even higher in primary schools.

These problems inevitably impact the labour market and contribute directly to the shortages of teachers being experienced in the Netherlands. This state of affairs should arguably favour the union by increasing union members' labour market power, but ironically it also causes problems. Rather than contributing to union action, teacher shortages make it easier for a teacher who faces a problem in their school to simply move schools – thereby individualising the solution rather than collectivising it. When this happens the workload problem moves around schools, rather than being tackled systematically.

What does 'local leadership' look like?

Schools are encouraged to have a school representative, but this role is quite limited. The principal role of the school representative is to convey information that comes from the union to members, although there is a generally limited expectation that school representatives will communicate information from the members to the union. Their role may become more conspicuous at times of union action, for example during recent strike actions. The union has an aspiration for a representative in every school, but one union official indicated that the union does not know where schools have, or do not have, a representative, and where representatives exist 'we do not know how active they are'. For example, there is a hope that school

representatives will 'pass on' to members the information they receive, but there is limited evidence about the extent to which this happens.

For the union, the most significant in-person relationship with members is that of the 'sectorconsulent'. This person is appointed by the union, through a standard selection process, into a fractional contract. For most of the time, they continue with their substantive job working in an educational institution and as such they retain their intimate knowledge of real world work experiences. However, as a *sectorconsulent* they typically have one day per week to support union members in their sector and region. *Sectorconsulents* work with members through in-person and online interactions. They provide two-way communication, ensuring that key union messages are communicated directly to members, but also acting to convey member concerns back to the union. AOB's website describes this aspect of the role in the following terms:

You listen well and you see how things are going. That broadens your view. You discover what our colleagues are concerned with so that the Algemene Onderwijsbond can get started with that.

Sectorconsulents are able to visit schools and try to resolve problems where they are able to do so. Where this is not possible, the issues are escalated within the union to a more senior level.

Alongside the school representatives, and sectorconsulents, the union offers a telephone based service that members can use to raise any problems they may be experiencing. This is clearly not an in-person service but it is acknowledged that for many members this is their most immediate contact with the union. As one union official indicated:

It depends where you are. I would hope in most cases it is the *sectorconsulent*. In my school it will be me – because my colleagues know my union role – but if you ask in other schools, it's the phone number. You've got a problem – so you call the union.

There are obvious advantages of such a system as members know they can receive a fast, efficient and reliable service. However, it is recognised that this can create a transactional relationship between the member and the union in which the member is dependent, and expects, others to fix the problem. The union is seeking to change this understanding of the union among many members – so that members see they are capable of fixing their own problems. However, this is currently work in progress.

One approach is to build up the role of the school representative so that they see themselves as more than a conduit of messages from the union to members, but rather they seek to develop a union identity among union members in the school. In such cases school representatives become a spokesperson for AOb members in the school – communicating back to the union, but also potentially to the school management. In these cases the *sectorconsulent* can offer a co-ordinating role as they develop networks of school representatives. This 'group building' at school level is very successful in some regions, but it also tends to be easier where there is a culture in the school of collaborative working. Where the school has serious problems, and the culture is 'broken', then there is often an element of managerial intimidation that creates fear. In these cases building a union identity among staff is more complex.

In an interview one union official indicated that this work is emergent and embryonic. It involves some significant re-thinking of traditional ways of managing union activity, and as such solutions and strategies are still being developed. For example, it was indicated that the union has not yet settled

on how it wants *sectorconsulents* and school representatives to divide their activities. The union is looking to develop more activist cultures, and there is a button on the union's website inviting members to become more involved – 'but we haven't quite worked out what we can offer to people who press that button, beyond getting involved in the usual activities and meetings'. There is an additional concern that if school representatives take on additional responsibilities they may over-reach their brief. For example, what might happen if a school representative provided poor, indeed incorrect, advice to a member? These are still issues that need some thinking through in the union.

The union is also organising more directly around professional issues, and not only industrial issues. This involves a series of very successful webinars on issues such as educational science and artificial intelligence, while the union has also developed its own professional development for members around teacher leadership. The union is currently developing a range of networks focused on key educational issues.

How are local leaders identified and developed?

School representatives have very informal roles in their institutions. As this role is relatively 'low stakes', school representatives typically emerge by volunteering to take the role on. In some cases *sectorconsulents* may have actively recruited the representative. Training is available to school representatives, but there is also a form of peer-learning through collective problem-solving where some school representatives are networked together using electronic communications such as WhatsApp. Where this works well it tends to happen because *sectorconsulents* are proactive in organising school representatives to network together. It depends on *sectorconsulents* being confident and comfortable to work in this way.

Sectorconsulents are appointed posts, following advertisement and open competition. There may be informal encouragement to apply for such posts, but this is limited by the need to ensure equality of opportunity in the selection process. AOb has a comprehensive training programme for members in multiple contexts, and this includes training for *sectorconsulents*.

How do local leaders link to the formal democracy of the union?

The very informal role of school representatives means that they cannot be considered to provide a link to the formal democracy of the union, and they are not intended to do so. However, this means they perform a necessarily limited role in terms of 'linking' members in workplaces to formal union structures.

Similarly, *schoolconsulents*, are union employees rather than elected members of the workforce and so their role is more focused on problem-solving for individual members and supporting school representatives. Members who become more active in the union, and who participate actively in its democratic structures, are likely to do so by engaging with the union's traditional structures.

Are there dedicated programmes to support particular groups in the union?

The Netherlands is a diverse country, in particular in its urban areas. The union has developed guidelines and criteria to ensure its collective bargaining agreements address diversity and equalities issues. However, there is a recognition that those engaged in union activity, and holding union roles, do not always reflect the diversity of the workforce and the community. The union is exploring a number of ways to address these issues, but it does not, as yet, develop specific programmes for members of particular demographic groups.

Case Study: Federació d'Ensenyament de CCOO de Catalunya - FECCOO (Spain)

Context:

FECCOO is the education sector branch of CCOO Catalunya (Comisiones Obreras), one of the largest and most influential trade unions in Spain. The union represents workers in all levels of education, from early childhood to university, including vocational training and adult education. FECCOO also represents both public and private institutions and all education workers. The union represents a wide diversity of workers.

The current political context is framed by a socialist party-led government, although there is increasing pressure from far-right politicians. Within the country there are deep ideological tensions, affecting values such as fairness, democracy, and equity.

The union is committed to defending public services – this includes a demand for improved wages as wages have not grown as the union had hoped. The union is also campaigning for increased investment in education. It has asked for 6% of GDP because current levels are only at 3.8%. Another priority for the union has been to demand job stability for teachers. This was a requirement of the European Union. Last year, it was possible to win job stability for an additional 36,000 teachers (between 2022 to 2024), which is described as a merit competition. The union organises predominantly in the public sector, but it represents workers in both sectors and each sector has its own problems. The existence of job insecurity favours the expansion of private and subsidiary schools, and in these places, working conditions are obviously harsher.

In the years since the Covid-19 pandemic the stability of teachers is the most pressing issue. The psychological impact on teachers and students, and the deterioration of mental health, also, has also been a great challenge.

And at the organisational level, the Union had to manage internal reorganisation and the recovery of mobility after the pandemic, following the lockdowns. Despite the challenges the union was successful in achieving 100% sick pay for workers, and an improved salary supplement. The supplement has been paid every nine years, but the union secured the payment every six years, combined with equal pay. The union is also campaigning for teachers who are involved in providing professional training programmes (FP teachers) to receive a salary equal to secondary school teachers.

Another achievement of the union has been the submission of the 21st Century Council administration, which promotes job stability, merit-based career progression, continuous training, a better work-life balance, regulated telecommuting, and occupational health and safety. The agreement also guarantees the union's participation in modernisation processes, policies on reducing temporary work, and ensures technological adaptation without loss of rights. All this is happening in a working and social context that has been profoundly transformed.

What does 'local leadership' look like?

The union has a traditional hierarchical structure based on developing organisational capacity at the national, regional, City, and school level. However, in each province or municipality (in the case of the major cities), the union has a leader who works with a team for different sectors; then, in different schools and education centres, there are union members who pass on information, try to resolve any doubts people may have, or pass on the questions and problems they have. This leader maintains direct and continuous contact with members and workers through visits, meetings, and various communication channels, such as specialised consultations and personalised mailing lists. They, and their team, work as a 'proximity delegation'. Their role is to ensure that members' voices

are heard, and that the unions responds to members' immediate needs. The goal is to ensure the union maintains a close and trusting relationship between the organisation and the workplace.

These local leaders also act as a link between the schools, the members, and the administration, since they sometimes are involved in meetings with the government. These leaders are in contact with the school councils with the aim of collecting information and helping in responding to all the problems that arise in the school. Information on key issues is continuously disseminated to members in schools. For example, one union official described how she has the contacts of all the members in her local area and every week she distributes information about the agreements being reached between the union and the administration, about local union training as well as events like assemblies and organisations. Local leaders are also those who work in the workplace, representing the union, informally or not. They are responsible for the team or the group of members/ affiliates in each institution, but mostly they pass information and help maintain a continuous contact with local leaders. In the private sector, the union struggles to have committees in schools, but despite this there is normally someone, a representative of the committee, representing the union. This is also the case in bigger institutions in the public sector.

How are local leaders identified and developed?

Both at the institutional level and at the municipal or local level, the union develops and supports local leaders through union training and mentoring, and coaching activities. Local leaders who are heads of a provincial team are selected through assemblies or by higher-level union structures that are organised at all the various levels: local, regional, and national. In specific sectors and institutions institution leaders

are also elected or selected locally, as in the case of universities, the public sector, and the disability sector. Local leaders are members of the union, but primarily workers. In most cases, they are elected, but when they are directly selected by the unions, there is usually an interview to evaluate their experience and profile. When a local leader starts their mandate, there is always training. The training can be distributed by people from within the union or by external experts who come in for specialised questions. The priority is to ensure that there is comprehensive and stable preparation of activist leaders. FECCOO also has advisory councils for members, that, when a question from a member arises, have the function to advise the local leader on how to respond. This is referred to as counselling. In addition, local leaders receive information from the union staff that is distributed to members via local leaders about political agreements or about relevant aspects of education policy. Therefore, if a member has a question, the local leader can access the information they need to provide an authoritative response. In addition, in the case of institution 'leaders', no formal procedure is in place to select them, since this is very much based on personal commitment and motivation

How do local leaders link to the formal democracy of the union?

Local leaders are nominated by the union; therefore, they must commit to the union's democratic rules and are accountable for them. Every four years, the union congresses in which elected delegates participate. In these elections, those members who are candidates and get the most votes are delegated to participate in the congresses. Another procedure may also apply, in specific cases, in which the union chooses delegates among teachers or workers who are already members of the union.

Are there dedicated programmes to support particular groups in the union?

In FECCOO, there is a system that has been tested by institutions to ensure that political minorities, with minimal representation, can participate in decision-making. Other minority groups are also represented, for example, in the current executive committee, there must be a representative for the LGBTQ+ community. The LGBTQ+ community also has representatives in each region, and at the local level, there are working groups within, so the union can hear the voices of all these representatives, and it is acknowledged they have an important role in the organisation. FECCOO aims to ensure that all policy officers reflect the interest of these groups, issues, situations, and special circumstances. These policies of inclusion are monitored and assessed periodically through assemblies and leadership committees at different levels. The executive committee and the council committee also monitor the progress. These rules are reviewed several times a year, and the union analyses the rules that emerge for each sector. The analyses them periodically, to look at the results, the difficulties, and the successes being experienced. A formal evaluation is conducted every four years, and the union congress, across all these sectors, analyses and evaluates the issues.

Case Study: Federazione Lavoratori della Conoscenza - FLC CGIL (Italy)

Context:

The FLC is the union of all those who work in schools (public, private, and Italian schools abroad), adult education, universities (public and private), research (public and private), vocational training, and higher education in the arts and music. In short, it is the union of those who work in knowledge sectors: managers, teachers, administrative staff, school assistants, technicians, technologists, and researchers, regardless of their employment status (public or private), whether permanent, fixed-term, collaborative, or precarious.

The union is a member of the Confederazione Generale Italiana del Lavoro (CGIL), which is one of the three trade union confederations that dominate Italian trade unionism. Education trade unions exist within the other confederations and so FLC operates in an environment often described as 'competitive multi-unionism', that is when different unions seek to recruit the same workers.

The FLC was created to bring together the entire knowledge cycle in a coherent framework, strengthen worker representation and protections, and serve as the political and professional reference point for a world that combines many diversities (skills, profiles) but with many commonalities (knowledge is a fundamental tool for providing people with equal opportunities).

A key challenge for the union is the level of resignation and passivity in society, and specifically in the world of work. The union perceives a lack of deep support for its struggles, and a tendency for citizens and workers to passively delegate their support to the unions. Political processes have been degraded and people have become cynical about their own role in society and their own ability to bring about change. For example,

there is a lack of genuine social dialogue, and citizens' distance from governments and politics in general is growing. Clear political identities are lacking and this has facilitated the emergence of populist tendencies.

The current government is a coalition of right wing parties with its roots in an authoritarian populism. The government makes no effort to engage with society: and the trade union movement therefore lacks genuine interlocutors, both in government and in opposition.

The union's current priorities are promoting justice reform and challenging the growing seeds of authoritarianism that the government's policies are sowing. However collective bargaining is weak and the government is not willing to engage in serious negotiations. This is compelled the CGIL (not just in education) to resort to increasingly confrontational action against the government and the parties that support them. This resulted in a series of high profile general strikes. However, this action does not always secure support from other trade union confederations and these divisions within the movement can be a source of weakness.

The overall picture in the country is one that continues to be framed by the austerity that has blighted Italy's public services for many years and which accounts for low levels of investment in education by international standards. All of this takes place against the backdrop of a lack of solid institutional relationships, which are increasingly being replaced by populism.

A key and immediate challenge for the union relates to the renewal of the national collective bargaining agreement. The most innovative aspect of this process is the one regarding integrated distance learning. However, also in the context of education, the union is opposing the government's revision of national guidelines on educational curricula for each of the academic cycles. The curriculum reforms reflect the political

priorities of the government and represent a sovereignist and Western-leaning reform of the curriculum's content. These combine with more general issues are related to authoritarian reforms, bureaucratic centralisation, and reforms that weaken the overall value of education. The central role of the democratic school within Italy's post-war constitution is increasingly being undermined.

The situation described above is unquestionably challenging for the union. However, there have been notable successes and these provide a platform for union building. Most significant is the increase in membership and votes of the Representatives of the Single Unions (RSU) (worker representations in the workplace, required by Italian law and collective bargaining, which are accountable to all workers, but are organized into lists of candidates with union affiliations) and growing political consensus. Within workplaces the role of RSUs is critical, and they provide tangible and visible evidence of the relevance of the union when representing employees' interests in their workplaces. FLC has seen the benefits of this success, both in terms of election results at individual workplaces and new members. These results are in part due to a strategic investment by the union in training, mentoring, and coaching RSU candidates. The growth in membership that has resulted highlights the benefits of a local level of union leadership that is located in workplaces and visible to workers.

What does 'local leadership' look like?

In Italy, public knowledge sectors are organised through national union membership and through the national measurement of workplace-level elected representatives (RSU). RSU elections are extremely important because their outcome at the national level, along with membership, measures the representativeness of sectoral unions. In 2025, the FLC CGIL was the leading union in all knowledge sectors.

An RSU is composed of three or more members, taking into account the size of the workplace. For example, the RSU of Sapienza University of Rome is made up of 45 including representatives of technical-administrative and related healthcare workers. Although workers submit their candidacies on union lists, the role of RSU is closely linked to closeness to colleagues, the ability to share and address their problems in the workplace, and the negotiation of the school fund allocation that finances extracurricular activities at individual schools and supplementary wages at universities, academies, conservatories, and research institutions. It is therefore a formal role, included in industrial relations processes, but not mandatory within union structures, because the RSU delegate need not be a union member.

The FLC CGIL considers RSU delegates to be the union's primary hub, involving them in frequent training courses as well as in political activities, such as signature collections, mobilisations, and the dissemination of initiatives. They have a critical dual dimension: they are co-workers, close to everyone's problems, but also union personnel through their involvement in the union's public activities. As members of the workforce, rather than as union employees, their involvement remains voluntary. However, the union appreciates the value of the dual role performed by RSU delegates and so the coordination role of the secretariat of the relevant provincial body is very important in supporting their work. This work is supplemented by the members' committee - a grassroots body within the union organisation that operates in all workplaces. It plays a fundamental role in directly representing members. Its main functions and roles include: representation; information and communication; bargaining and labour relations; promoting membership and participation in union life; convening internal meetings and participating in mobilisations or initiatives; liaising with the local structure; and democratic participation. For union members

in the workplace the members' committee is the key link to the democratic culture of the union.

From within the workplace area delegates, those workers who, while remaining fully or partially 'in production', play an important role on behalf of the provincial secretariats in establishing direct links between the union structure and the workplace, supporting the RSU in political activities and institutional bargaining, and bringing the union's perspective to the table.

How are local leaders identified and developed?

The FLC CGIL considers union renewal extremely important, so much so that in the summer of 2025 it brought together all national and territorial leaders for three days to discuss new organisational models. The process has just begun, and several solutions are being developed, including those at the confederal level, in preparation for the next CGIL congress scheduled for 2027. But the union is not starting year zero – the various territories have developed many different solutions suited to their contexts (one of which was presented during the *Your Turn 1* project). This is a network project that enhances direct contact with workers. The project envisions a new role for RSU delegates, or rather, for some of them, who may be the most motivated, the most enterprising, and consequently the most well-trained. Since each workplace has an elected RSU worker, the project aims to create a network of connections between schools, which, in groups of 10, constitute a node of the network. This intermediate level between the school and the local secretariat can become a hub for consultation, networking, and information exchange, even though official representation with school principals remains with the union secretariat. The intention is to maintain robust democratic

structures, but to also create more informal spaces where activists can connect easily and learn from each other.

It is clear that training is an essential element of the project. Frequent local training sessions planned, in addition to the annual national training already scheduled. Local training can be more accessible and helps representatives connect with their peers. An important priority is the organisation, both locally and nationally, of meetings and training sessions for the RSU delegates. RSU delegates receive publications and documents to support their efforts, particularly in relation to the contract and the profession, but also about the history and values of the CGIL. Providing this type of organisational history is important in ensuring that representatives work within the distinctive spirit of CGIL. In addition, when selecting RSU (union representatives), and even more so for delegates—when they are not elected from the secretariats—mentoring and coaching are crucial.

How do local leaders link to the formal democracy of the union?

All these roles and institutions are formally defined both by Italian law and regulated by the national collective bargaining agreement, as well as by the union's bylaws and regulations. In this sense, every member is an integral part of the democratic organisation—both representative and participatory—of the CGIL and the FLC-CGIL.

Are there dedicated programmes to support particular groups within the union?

In FLC-CGIL, there is a commitment to gender balance as a principle, and the union's statutes require all union bodies to have a gender balance of no less than 40%. The 'regulatory centres', those bodies responsible for monitoring and verifying, have the power to invalidate electoral bodies and procedures that do not comply with certified quotas.

In the past, the union has attempted to develop similar initiatives for ‘youth’, meaning workers under 36, but these policies were not obviously successful.

Case Study: Lithuanian Education and Science Trade Union - LESTU

*I always say to the workplace representatives – I can't do what they do – I can't. . . they are the people who really show to our members what this organisation is. They are like a face of the organisation.
(Senior LESTU official)*

Context:

LESTU is the largest education trade union in Lithuania and has over 12,000 members and represents education workers in all fields of education, ranging from pre-primary teachers to lecturers and researchers in universities and vocational education and training (VET) schools. Higher education workers are typically represented by another union - Association of Lithuanian Higher Education Trade Unions (LAMPSS), but LESTU also has members from higher education institutions. LESTU is a member of the Lithuanian Trade Union Confederation (LPSK) and is the largest trade union member of that organisation. The union has a significant role in both the education sector and in civil society more widely. Its strength helps to explain why LESTU was able to secure a ground-breaking collective agreement in 2017 which represented a major step forward not only for the trade union, but also enshrined in law a constant annual increase in the wages of education sector employees. The education sector collective agreement was the first such agreement in Lithuania and provides for annual negotiations over key terms of conditions - wages and additional social

guarantees for trade union members. As every year, negotiations on the renewal of the collective agreement took place in 2025, and the result of these negotiations was an agreement that on January 1, 2026, the wages of employees in the education sector will increase by 7.65 percent.

LESTU is politically independent and in dialogue with employers is deeply committed to influence the education policy formatted by the Government and the Parliament. The trade union has developed constructive relations with government, which is currently a centre-left coalition with the Prime Minister, Inga Ruginienė, being a previous Chair of LPSK (from 2018-24). However the country faces numerous challenges, and these inevitably impact the education sector. The war in Ukraine has generated considerable insecurity and a commitment to increase military spending is putting public spending in other areas under pressure. LESTU faced serious challenges in negotiating the renewal of the collective agreement and the state budget for the next 3 years, including its education component. However, an agreement was reached, although doubts remain about how the government will be able to meet its obligations under the collective agreement in the future. At the same time teachers report that commitments to inclusive education are not being properly resourced and are creating considerable pressure, while research of the education sector on psychological violence conducted in 2023, commissioned by LESTU, revealed that teachers are experiencing high and different levels of systemic pressure from multiple sources, including students, managers and often parents. The study data shows that 33 percent of the teachers surveyed have experienced physical violence from students. Psychological violence is increasingly becoming a reason why teachers leave the education system, and many new entrants into teaching are not willing to work in such conditions.

LESTU has achieved some considerable successes, not least the 2017 Collective Agreement and its annual updates, and the union's prominent role in civil and political society. However, it must constantly consider its own renewal. The average age of a Lithuanian teacher is 51 years and only 4% are thirty years old or younger. Maintaining the union's strength and influence will require a commitment to constantly rebuild. One element of this process of renewal is a commitment to create a 'community culture' around the union, in which members are encouraged to feel that they belong to the union with a group identity, rather than being individualised payers of their subscription. One official commented that the union should be a place where members can have a great time together as well as experience its more serious elements - training, participation in formal events and conferences.

What does 'local leadership' look like?

The trade union is organised at three levels, national, municipal and workplace, with union officers elected at all levels. The trade union can make collective agreements at all of these levels, including at workplace/school level. One feature of these agreements is that some of the benefits that have been negotiated by LESTU are only available to LESTU members. These include provisions for additional three rest days, three days for self-study or volunteering, 10 days of study leave, 5 days to improve one's health, 3 days a year off for work related to trade union activities and 72 hours per year for trade union representatives to perform their duties and they offer an obvious and tangible benefit of union membership, that understandably supports recruitment. The overarching framework for these agreements is the 2017 Collective Agreement, but there continues to be real and meaningful flexibility relating to the negotiation of agreements at the school level. This type of school-based bargaining can present complications for trade unions, but it also provides an obvious organising focus for

the union which can press for improved terms and conditions in a number of areas, including pay supplements or working practices (such as remote working).

These school-based agreements are negotiated by LESTU's workplace representative, supported if required by regional, and sometimes national, officers. Any workplace with three LESTU members is able to elect a LESTU representative, and the representative is able to negotiate a school-based agreement. The national education sector collective agreement ensures the workplace representative has 72 hours per year time off to undertake trade union duties, and the representative is also protected from dismissal, thus limiting the potential for victimisation.

Where trade unions are well organised at the workplace, they are able to achieve tangible improvements for members. They can also provide a bulwark against managers who are reluctant to adopt collaborative practices, but instead prefer to act unilaterally.

As well as being able to secure practical advances for union members in their schools, the union representatives become the 'face' of the union to other union members. One official put it in the following terms:

I always say to the workplace representatives that I can't do what they do - I can't. I could create a social media campaign using Facebook and Instagram to show what a fantastic organisation we are. But they are the people who really show to our members what this organisation is. They are like a face of the organisation - how they react, how they help.

How we manage things at school between members and the management of the school,

they are the people who do that. That's why I think they are the most important people in our organisation.

The union intentionally encourages school-based representatives to resolve their own workplace problems by drawing on their own resources. Support is available, and workplace representatives are encouraged to escalate issues if they need to – but the union is keen for members to not see help from elsewhere in the union as the default solution to every problem.

How are local leaders identified and developed?

LESTU recognises that because local leaders, at the municipal and school level, carry considerable responsibility (due to their involvement in collective bargaining) then it is important to provide them with appropriate support. The trade union has recently developed an expanded leadership programme in association with one of the Lithuanian universities. The programme comprises a 'theoretical' and a practical element and it involves simulations to help participants develop the skills to navigate complex negotiating environments.

Training programmes are aimed at different levels of leadership, as well as being directed to the membership more widely. For example, municipal leaders can access training focused on a range of negotiating issues, while member focused training is more likely to address wider issues of knowledge and awareness raising, for example, in relation to Artificial Intelligence.

The trade union places a high priority on training and leadership development, although there is a view that the programme currently on offer is not as good as it might be in terms of reaching those it needs to support. The trade union is therefore reviewing its

current provision in order to enhance its effectiveness. The focus will be on ensuring training programmes are accessible to those who already have limited time due to their significant roles.

How do local leaders link to the formal democracy of the union?

Because of the bargaining structures discussed above LESTU's workplace leaders are already deeply embedded in the formal democracy of the union. The union-negotiated collective agreement sets out clear roles, rights and expectations relating to the roles of workplace representatives with formal elections, access to the school management, and direct links to structures at the municipal level.

Individual members get to elect their workplace representative and through this role members are plugged into the democratic structures of the union. Where there exists municipality organisation workplace representatives are contacted by the trade union's municipality leadership and engaged in knowledge sharing in a two way process with information flowing upwards and downwards. In this context knowledge flows also work horizontally as workplace representative are brought together to share experiences and engage in collective problem-solving.

The union's formal democracy is understandably important, but emphasis is also placed on encouraging informality, and creating spaces for workplace leaders to network outside of the formal structures and their committees. Social occasions are built into the calendar to facilitate relationship building, and the construction of a union community.

Are there dedicated programmes to support particular groups in the union?

At this time the union is focused on general programmes to develop leaders. There are no formal programmes directed specifically at, for example, younger members, but there is a very extensive programme for new members about trade union activities, which LESTU calls the 'trade union alphabet'. It is recognised that by developing leadership closer to the members then it is likely that those taking on union roles will look more like the union's wider membership in all its diversity.

Case Study: Pedagógusok Szakszervezete - PSZ (Hungary)

We try to show that power is in community – and we are trying to build community in the workplace.
(PSZ Vice-President)

Context:

The Hungarian teachers' union (PSZ) represents all types of education workers (teachers and education support personnel) in the Hungarian education system from Early Years through to personnel in Technical and Vocational Education and Training. The union is not the only union organising in these sectors, and the union does not represent members in the higher education and research sectors. The union is a member of the Szakszervezetek Együttműködési Fóruma (SZE) trade union confederation in Hungary.

The union faces substantial challenges, many of which are linked to the increasing authoritarianism in the country associated with the government of Viktor Orbán. These trends within the Orbán administration are well known in terms of their impact on education (see for example the forced closure of the Central European University),

but also include attacks on wider trade union rights. Many national policies and government communications are intentionally divisive and are intended to consolidate government support by creating a culture of fear. This is evident in relation to groups including migrants and members of the LGBTQ communities. Those associated with independent and free thinking, such as journalists, judges and educators were recently characterised by the Prime Minister as 'bugs' or insects that needed to be eradicated³.

The Orbán government attack on independent and critical thinking has a clear focus on the education sector. The government has created a highly centralised system in which power is concentrated in Districts and the organisation that represents the 60 different Districts. School principals are appointed by the Ministry on the advice of school district principals. Political patronage ensures that those in key roles are compliant in relation to implementing government policies. This includes the adoption of the national curriculum that provides teachers with very little space to exercise their professional judgement. Text books are all government authorised. At the present time there is no Ministry of Education, but rather education policy is the responsibility of the Ministry of the Interior.

Despite these difficulties teachers have been successful in securing important pay rises. This was partly driven by labour market necessity (teachers' salaries were 50% of average graduate salaries) but also resulted from combined pressure from the European Commission (who helped with funding) and Hungary's trade unions. PSZ was able to combine effective lobbying of the EC, together with militant action by its own members, to force the government to raise pay. By January

3 <https://europeanjournalists.org/blog/2025/03/19/hungary-journalists-demand-an-apology-from-viktor-orban/#:~:text=Prime%20Minister%20Viktor%20Orb%C3%A1n%2C%20in,the%20Prime%20Minister%20could%20spread.>

2024 this was 72% of average graduate salaries and in January 2025 the figure had risen 80%. Since then the government has point blank refused to negotiate further on pay, and this situation will not change until after elections in 2026. Pay for education support personnel continues to be very poor, and is the focus of a sustained campaign by PSZ.

The environment can clearly be considered hostile when looking at the spaces for trade unions to function and exercise their, albeit limited, democratic rights. However, PSZ has developed a strategic response to ensure it continues to grow in difficult times. In such circumstances the union's focus on renewal becomes even more important. Strategically it recognises that, in the current moment, progress on pay at the national level is not possible – so the union pivots to where it can make progress and win – at the level of individual employers, and in some cases in individual schools.

What does 'local leadership' look like?

The union has a traditional hierarchical structure based on developing organisational capacity at the national, regional, City and school level. Within the union power has historically been focused on strong regional structures, and these continue to be key. Membership records and contact details for members are held at the regional level. However, the union's renewal strategy has been sharply focused on building union organisation at the base – in workplaces. This has involved the development of the role of the workplace leader. In many cases the workplace leader is the union's formal school representative, but in other cases the emergent workplace leader is an ordinary union member without any formal status as a school union representative. In some cases, the emergent workplace leader is not a member of the union at all, but has

been identified as an individual capable of winning the trust of union members and work colleagues.

Historically, union workplace representatives have had a strong service-oriented perspective, rooted in the legacy of soviet era trade unionism when 'the union' was seen as a source of services such as pensions and social insurance. Trying to change this thinking is the 'mindset shift' the union's renewal strategy is intended transform. As one union official stated 'they [the members] are the ones who can solve their own problems'. She continued 'We want a mindset change – "you are the ones who can make changes - real changes. At your own workplace"'. This is a substantial shift in thinking, and it must be nurtured. It is an educative process in which members learn to think differently – and then translate new thinking into changed actions. From dependence and passivity to independence and action. The change represents a mindset shift within the union, as well as among members. In some regions the change is well understood and the local leadership is enthusiastic. In other areas, there is still a need to persuade union officers of the need for change. The rate of progress is uneven, as might be expected.

How are local leaders identified and developed?

Local leaders are identified and developed through a process of careful leader identification, education and by engaging in structured and purposeful action. People develop as local leaders through, and in, action – supported by education, training and a form of coaching.

The union adopts a six step educational programme that focuses on organising that has been developed and disseminated by PSZ's national confederation. The intention is to identify the issues that are key to members' concerns, and then develop strategies,

involving negotiating and campaigns, to bring about improvements.

The process begins by mapping union organisation (and hence union power) in designated geographical areas. As one union official noted – ‘we need to know where our resources are’. National and regional representatives develop their analysis of where the union is strong and not so strong, then a strategic decision is taken to focus on a specific employer, in a specific area, where the union already has a level of organisation. A key principle is to organise where there is strength, and use the example of winning to inspire and organise in those areas that are less strong.

Once an employer has been identified the regional representative convenes a meeting of workplace leaders, encouraging attendance by the maximum number of workplace representatives. Workplace representatives are trained in basic organising skills and return to their school to conduct a questionnaire with as many staff as possible. The survey is short and simple – it asks respondents to identify their workplace grievances and to highlight the one issue at their school they would most like to change. They are also invited to provide their name and contact details. This is optional, but it is important as it helps to build the database of those sympathetic to the union’s agenda. Crucially, the questionnaire is distributed in person, and not electronically. The PSZ official noted – ‘when you hand out a survey directly, it becomes the start of a conversation’.

Survey results are analysed by national and regional officers, and a second questionnaire is designed. This is more sharply focused, drawing on the results of the first survey. A second workshop is called with the workplace representatives and they are invited to finesse the final copy of the second questionnaire. There is also support provided to representatives so that they feel confident having conversations about these issues in their schools. The representatives undertake

the second survey – and with each iteration they build a relationship with their colleagues, and they develop a deeper understanding of how individual members think about the issues.

Analysis of the second survey allows the union to focus on key issues that are a source of grievance for workers, and where feelings about the issues are strongly held. It also provides the union with critical data about its own power. For example, if the second survey has a lower response than the first survey then self-critical questions about trajectory and momentum need to be confronted. As the official stated – ‘we always follow the numbers’. Assuming positive data the aim is to develop an employer level campaign to address the issue, or issues, highlighted in the survey. However, in some cases the survey results point to a particular issue in an individual school, in which case the union can take action accordingly.

The whole process is conducted in a way that gives the workplaces representatives maximum agency. There is no guarantee the union’s campaign will be successful, but its chances of success are increased as the issue reflects members’ concerns, and is rooted in a democratic process that involved members at all key stages. The process itself is driven by the workplace leaders – who develop their relationship with their colleagues as the process progresses from step to step. Workplace representatives develop as leaders as they build confidence that flows from having an enhanced credibility and legitimacy with their colleagues. They are supported by regional staff, with contact that is always ‘live’ (in person or by phone). There is a recognition that relationships matter and email and other forms of electronic communication are avoided. Training, and coaching, are also key to the support provided to workplace leaders.

How do local leaders link to the formal democracy of the union?

The fact that not all workplace leaders are necessarily union members indicates that there is a strong dependence on developing informal links, and building strong networks within and across workplaces. These will often be closely connected to union structures, but the key aim is a lively workplace culture that engages and involves employees – both union and non-union members. This does not conflict with the union's formal democracy, but the hope is that union democracy can be made deeper and richer by mixing the need for structure with the experience of vibrant, participatory workplace cultures that become union focused.

Are there dedicated programmes to support particular groups in the union?

At the present time, the principal focus is on building strong workplace organisation, often in an environment that at national and workplace level can be profoundly antagonistic to union organising. The feelings of fear experienced by many members can be palpable, and there can be real consequences if members experience victimisation of any sort. In such circumstances building the maximum possible unity of workers, around basic issues that are capable of unifying people is the priority. However, the organising methods used have been developed by those with connections to PSZ's young members' section and it is to be hoped that building stronger workplace organisation will draw in newer and younger members. Whether this is the actual outcome will depend in large part on whether Hungarian teachers can build an education system that young teachers want to work in, and stay working in.

Case Study: Syndicat National des Enseignements de Second degré - SNES-FSU (France)

Context:

SNES-FSU is France's largest trade union for secondary education staff, including teachers, school counsellors (*Conseiller•e principal•e d'éducation*, CPE), guidance counsellors (Psy-En) and education support personnel for pupils with disabilities (*Accompagnant•e des élèves en situation de handicap*, AESH) or in charge to supervise the students (*Assistant•es d'éducation*, AED). It is affiliated with the FSU (Fédération Syndicale Unitaire), the main public servants federation in France. SNES-FSU defends a high-quality, free, secular, and egalitarian public education system. It promotes educational justice, professional recognition, and democratic values within schools. The scope of its representation is Middle and high school teachers, Educational and 'Psy-EN' (guidance counsellors and national education psychologists) in secondary education. The union has nearly 56,000 members.

France has had a context of political instability since the general election in 2022, and it has worsened since the general election in 2024. There is no majority in parliament. Parties from the Left won the election, but with not enough seats to form a majority. The result is an alliance of Centrist and Conservative parties without a majority. The consequence is the government is very weak and could fall at any moment. This creates not only instability but uncertainty.

SNES-FSU is engaged in campaigning about the public budget for education, since France is in a new phase of austerity with new job cuts, a salary freeze and further cuts in health. While contrasting these policies with the employer, SNES-FSU is bargaining for better salaries and against job cuts. The union is also facing a very new debate about workload. The

debate centres on how many hours a student must have in class during the day, and overall during the week. This has become a big debate about holidays, about working time, the workload for the day, and for the week. Bargaining on these issues is mostly at the national level since all the main rules about workload are decided at national level. France remains a very centralised system in political terms. Bargaining at the level of the single institution exists but is on a local and specific topic. For example, about the organisation of the day such as in a lycée where the union was negotiating with the Director to provide more flexibility during the day.

As has been indicated, many of the key challenges derive from the political situation, which is complex and confused. Among the most significant challenges encountered, the main one has been pension reform for all workers in France, not only educational workers or public servants. In 2023 there was a major mobilisation against this pension reform. The union participated in and organised many demonstrations with millions of people on the street, and a very tense debate in the parliament. In the end, the government passed this reform with a constitutional tool that allows the passing of a law without the vote of parliament (article 49.3). However, the struggle was very important because although the government won the first battle, in the long term, it ended up weakening itself. For this reason, in the negotiation during the election in 2024, and in the negotiation about the budget during the last weeks, one of the conditions of the Socialist Party to keep the government alive was the suspension of the pension reform. So, in the medium term and in the long term, this was not a victory for the government but a victory in the capacity of mobilisation of the unions.

A second challenge is focused on education and relates to a reform in the first year of secondary school, (collège), known as “*Choc des savoirs*”. The reform aimed at changing the group class by dividing the group into

smaller groups in mathematics and French according to the level of proficiency (merit) of students. SNES-FSU was against this kind of organisation because it is deemed very segregational, and it is not a solution to improve the inequalities between the students. The main message at that moment was ‘*nous ne trierons pas nos élèves*’ (‘we will not select our students’). This has been a long-term struggle, and was only implemented in a minority of schools (the union estimates 20%). However, in December 2025 the Minister announced that the separate groups for mathematics and French classes would no longer be compulsory in the next academic year. A union official indicated ‘*this is an important collective victory for our union*’.

Many of these inappropriate reforms reflect a lack of social dialogue. SNES-FSU is asking for more, and better, social dialogue, since the union is convinced that improved social dialogue, could avoid reforms that do not address the real problems.

What does ‘local leadership’ look like?

At SNES-FSU, there are four organisational levels. S4 is the national level, S3 is the regional level, S2 is the district level and S1 is the local level. Local leaders are at the S1 level. S1 is the section of the union based in the school. All the colleagues who are affiliates of SNES are members of this S1. As a local section, S1 represents both the section and its leader, the local leader.

The S1 is a local section, and its precise form depends on the school. There are schools with more affiliates, and schools with fewer affiliates. The union aims to have S1 in as many schools as possible. This is a high priority for the union for two reasons. First, local leaders pass information and analysis to members from the national and regional levels to the local section. But, in reverse, they also gather the information from the base to make the analysis as precise as possible at

the national level. S3 and S2 sometimes will negotiate or relate with the representative of the state in the region or the district. In France, the core of the educational policies is made at the national level, and this is much more limited at the regional level. Only on very few topics is there something like a negotiation at the regional level. It exists more for primary school than secondary school, but some topics for secondary school are also at the district level. So the role of the S1 is to pass information to S2, and S2 has a more coordinating role of the S1 networks that are at the local level.

How are local leaders identified and developed?

Since in SNES all unionists are workers 'in production', no matter one's level of responsibility, *'union officers always remain a colleague'*. All union officers are in class for some hours. From the school-based representative to the general secretary, leaders are in class, even if it is for a few hours a week. This is a core principle for the way the union works with a membership that always directly connected to the workforce.

At the level of the individual school the S1 leader, according to the bylaws, should be elected by the section of the school – that is by the union members in the school. However, in many schools, there may be a limited number of members and so the designation is more by acclamation. The vote is not contested and can be described as a formality.

While the union tries to encourage formal meetings of the local section, the organisation of those meetings has become increasingly complicated over recent years. Rising workloads cause major problems and it is now quite impossible to have all the sections in a school free at the same time. An increase in workload during the last year has had a particular impact on staff and this can militate against organising members. The organising

by emails or WhatsApp groups has become crucial and very helpful but there is a view that the lack of in-person contact is a loss. One union official commented:

This is a problem we are trying to solve. Unions have the right to convene one one-hour assembly every month during the workday, but members are always running against the clock.

In this context, the S1 leader acts as a relay for the union. They are expected to explain to members or their colleagues the union's analysis and the political perspective of the union. As indicated they are expected to pass information from the national level to members but also to gather 'the sensations' on the ground. It is considered important that local leaders must give a good impression of the union; and it is recognised that the personality of this local leader is very important to build credibility and, in turn, acquire more members.

Another mission local leaders have is to be a key interlocutor with the Director of the school – *'we expect them to defend the interests of their colleagues and to be a landmark for the union at the local level'*. It was argued that many S1 leaders are proud of their role, but their experience can be very different: *'you can have an S1 leader with a lot of experience or a young member who is building from nothing'*. To support them, the union has a specific mailing list to pass information to receive or to share information between the S1 leaders. There are also specific publications for them on professional and political issues and on how institutions work. These publications provide information on laws on education, but also more practical information on negotiation and local bargaining. The union has a very good website which is obviously national in its orientation but which provides important advice to help the S1 leader to explain situations to their

colleagues. When in doubt, S1 leaders are encouraged to seek advice at the district, regional or even national level, to have more precision.

In the event of a strong conflict with the Director of the school, for example, the S1 can ask for an intervention at the district level to S2. There is no need for them to be alone in a face-to-face with the director – ‘*We are very present with that*’ commented one official.

The union places a strong emphasis on training its S1 leaders. Coaching and mentoring are available and this is both formal and informal. Mentoring is considered very important to pass the experience from the oldest members to the youngest. Training is not obligatory but is recommended to local leaders. The union trains its leaders about educational and professional topics as well as on industrial issues. Within the union a very important tool is ‘*Constituer un réseau de S1*’, a network of S1 leaders useful to strengthen the network at school, and also for the S2 level to make better connections with S1 leaders. A second tool is *Journée du SNES*, (Days of SNES FSU). This is a huge training programme involving very many S1 leaders participating in two two-day activities in Paris:

During these two days we talk about the history of SNES, the political position of SNES, who we are, and why we are like we are.

The union places a strong emphasis on building a union identity in which S1 leaders develop a shared outlook on all the key issues facing the union and its members.

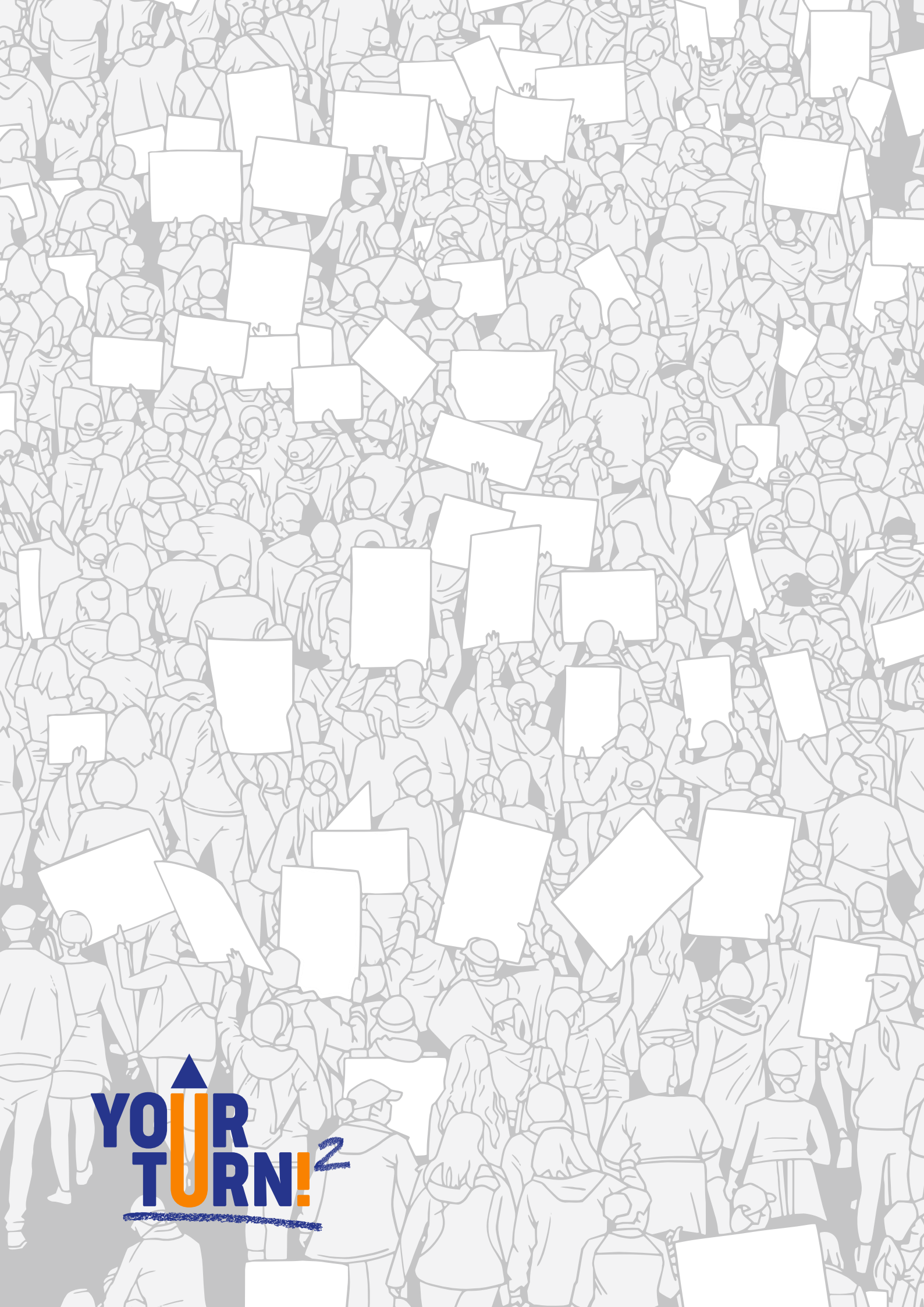
How do local leaders link to the formal democracy of the union?

In SNES, as in other unions, internal democracy is very important. It has internal votes that work through congresses. Many

votes are quite traditional ‘*we vote with paper and a box at the school, inside the school*’ – but this is valued. The experience of voting is real, and shared with other colleagues at the workplace. Members experience their democracy as something tangible. The National Congress is composed of elected delegates from the local level. Therefore, the S1 leader also has the responsibility to ensure their colleagues vote and to build membership. ‘*Having more voters, and more members participating in the internal democracy of the union, is a key objective for the union. This is very important to us*’.

Are there dedicated programmes to support particular groups in the union?

Gender balance is very important to SNES-FSU. The union is committed to increasing the number of women with key responsibilities, also at local, regional, district, and national levels. The union has specific training about equalities issues within the union, but there are no special programmes for ethnic minorities or for younger members. The union may consider expanding work into these areas, but this does not exist at the moment.



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