

**Learning for Solidarity: transformative journeys  
into global trade union activism.**

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## **Abstract.**

This thesis explores the intersection at which UK trade union learning meets global worker solidarity, primarily through the use of in-depth interviews with learners and learning providers. It examines the extent to which trade union learning influences and activates members to respond through solidarity to address key challenges posed by neo-liberal globalisation. Mobilisation theory is drawn upon to assist in identifying the foundational elements for global active-solidarity formation whilst transformative learning theory assists in examining any possible complementarity with trade union learning methods and approaches. Research into formal learning through trade union courses and informal learning opportunities, including overseas study visits, indicates that awareness of global labour issues is growing, as is active-solidarity, supported in large part by contemporary trade union learning provision. Nonetheless, dominant global ideologies, limited member mobilisation and continuing trade union political disunities present a challenge for transformative learning and global trade union solidarities.

## **Abbreviations.**

AMRC	Asia Monitor Resource Centre
BFAWU	Bakers, Food and Allied Workers Union
CAFCASS	Children and Families Court Advisory and Support Service
CSBT	Central Bolivarian Socialist Workers in Venezuela
CTUS	Centre for Trade Union Studies
CMU	Ceylon Mercantile Union
DfEE	Department for Employment and Education
DfID	Department for International Development
FENSUAGRO	National Federation of Agricultural Farming Unions
GFTU	General Federation of Trade Unions
GLI	Global Labour Institute
GMB	General Municipal Boilermakers Union
GUF	Global Union Federation
IFWEA	International Federation of Workers' Education Associations
ILO	International Labour Organisation
ITUC	International Trade Union Confederation
ITF	International Transport Workers' Federation
IUF	International Union of Food and Allied Workers' Association
MDG	Millennium Development Goals
Napo	National Association of Probation Officers
NGO	Non-Governmental Organisation
NUJ	National Union of Journalists
NUT	National Union of Teachers
PCS	Public and Commercial Services Union
Rep.	Representative
RMT	National Union of Rail, Maritime and Transport Workers
SEWA	Self Employed Women's Association
SFPA	Strategic Framework Partnership Agreement
TNC	Trans-national Corporation
TUC	Trades Union Congress
UCU	University and College Union
Unicef	United Nations Children's Fund
Unite	Unite the Union
VSO	Voluntary Service Overseas
WLRI	Working Lives Research Institute

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<b>Chapter One: Introduction</b>	6
<b>Chapter Two: Design, methodology and conceptual framework</b>	19
2.1 Research Design	19
2.2 Conceptual Framework	34
<b>Chapter Three: Literature Review</b>	44
3.1 Globalisation, labour organising and trade union learning	44
3.2 Globalisation: a contested notion	45
3.3 Organising: labouring in a cold climate	47
3.4 Labour Mobilisation: getting globally active	48
3.5 Civil Society Engagement: forging community links	50
3.6 Solidarity: a collective understanding	52
3.7 Solidarity: previous empirical findings	59
3.8 Trade Union Learning: a transformative experience	62
<b>Chapter Four: Union Learning</b>	67
4.1 Context	67
4.2 Course Examined	73
<b>Chapter Five: Understanding Worker Solidarity</b>	78
<b>Chapter Six: Formal Learning for Solidarity</b>	86
6.1 Formal Learning and Transformation: some activating factors	87
6.2 Formal Learning and Transformation: some key phases	101
6.3 Formal Learning and Trade Union Reps: the ULR experience	104
6.4 Transformative Learning: Trade Union Pedagogy	107
6.5 Documentary Data Themes	116
<b>Chapter Seven: Informal Learning for Solidarity</b>	121
7.1 ULRs: signposting solidarity	123
7.2 Labour Conferences: informal sites for solidarity learning	136
7.3 The World-Wide Web: a tool for global activism	138
7.4 Civil Society Engagement: a diverse mix	140
<b>Chapter Eight: Study Visits and Solidarity</b>	144
8.1 Useful Knowledge: a two-way exchange of ideas	145
8.2 Immediate Experience: the real thing	146
8.3 Political Awareness: fighting for your rights	148
8.4 Getting Active: an exercise in creativity	150
8.5 A Reciprocal Process: working on an equal basis	153
<b>Chapter Nine: Discussion and Conclusion</b>	156
9.1 Supported Journeys into Solidarity	157
9.2 A Pedagogy for Solidarity	164
9.3 Voices of Transformation	168

Bibliography	181
Appendix A	195
Appendix B	198
Appendix C	199
Appendix D	200

## Chapter One: Introduction

The literature on globalisation and trade unionism over the last two decades is littered with notions of shock (Waterman and Timms, 2004) and onslaught (Munck, 2010). Whilst not new, the contemporary phase of accelerating globalisation, with its attendant and dominant political ideology of neo-liberalism, has driven trade unions to respond via self-reflection to re-evaluate their positions (Munck, 2010; Evans, 2010). Such now familiar trends as increasingly precarious work, enhanced employment flexibility, the feminisation of work, increased labour migration, and the casualisation of employment, all within the context of class polarisation, increasing social inequality, and ever shifting global imperial power, have exposed the limitations of nationally and transnationally organised labour (Kynge, 2006; Chomsky, 2010). It is within this maelstrom of ongoing political, social and ideological change that the objectives of this research are situated.

This thesis attempts to explore the role played by UK trade union learning provision within the continuing evolution and crystallisation of trade union responses to neo-liberal globalisation. It focuses specifically upon trade union supported membership learning aimed at consciousness raising, critical knowledge development and solidarity construction. This focus takes precedence over that of examining skills based, employer funded training initiatives. What, we ask, is the role of union learning in meeting the challenges presented by the hegemonic influences of neo-liberal globalisation, which can be encapsulated in the view of one commentator as, “a lot of rhetoric about individual freedom, liberty, personal responsibility, and the virtues of privatisation, the free market and free trade,.....designed to restore and consolidate capitalist class power”. (Harvey, 2011:10). In the experience of trade union members, is it meeting these challenges? What, if any, counter-hegemonic knowledge development opportunities are being offered by UK trade unions and how is this impacting upon their members’ experiences of worker solidarity in the face of global worker exploitation,

deepening social inequality and the growing influence of free-roaming transnational capital?

Neo-liberal globalisation has further critically exposed and illuminated differing trade union motives, actions, internal ideologies and discourses relating to transnational matters. This has intensified the union debate and academic discourse between advancing collective global endeavour whilst simultaneously defending entrenched parochial interests (Hyman, 2002; Stirling, 2010). Indeed, for the younger generation of trade union respondents interviewed for this thesis, no other world has been experienced beyond that in which free-flowing global capital dictates to global labour, driven by the advancement of neo-liberal ideology. Even within the older participants' narratives, any other world is mostly confined to globally fragmented visions of hope within an alternative political landscape (Harvey, 2011; Chomsky, 2010). For some in the early years of this century the global neo-liberal challenge foreshadowed either "the end of the beginning or the beginning of the end" for organised labour at all levels (Hyman, 2002:12).

For a number of UK trade union leaders the onslaught of neo-liberal globalisation amounts to "a social war.....being waged on a global scale" (Prentis, 2011:1) with UK trade unions having to commit to collectively renewing efforts to halt the subsequent membership decline and any national or international fragmentation. In responding to the shock of globalisation, some UK trade unions and global union organisations have steadily adopted renewed perspectives on issues of transnational labour and attempted to re-align their individual and collective stance, driven by historical traditions of solidarity with workers across the globe (Unite, 2010). Expressed visions of a brighter future appear founded upon improved world-wide organisation, including through the International Trade Union Confederation (ITUC) and Global Union Federations (GUFs), with internecine warfare being reduced; partnership working with transnational non-governmental organisations (NGOs) and other civil society agents being now more established; with trade unions having adopted communication tools of the digital age; and national unions and their members being more orientated towards ideas of globalism

(Evans, 2010). Although the exact strategic approaches required for global labour workforce empowerment remain contested (Waterman, 2001; Stirling, 2010), the contemporary discourse remains vigorous (Burawoy, 2010).

Some of the revitalisation of trade union hopes and aspirations has occurred since the global financial collapse of 2008. For the UK's Trades Union Congress (TUC), government policies in more recent years are increasingly predicated upon, "the bankrupt dogmas of neo-liberalism, privatisation and austerity" (O'Grady, 2012). Further still, from a Majority World perspective, as espoused by the Venezuelan CSBT, whilst "very important changes are taking place, especially in terms of working people....capitalism and colonialism are in deep crisis at the same time" (Torres, 2012). This expressed sense of renewed hope by trade union confederations is intended to provide space for political, social and ideological contestation to continue anew in an effort to prevent any economic and social race to the bottom of the global labour pile. Worker solidarity is thus by necessity a key ingredient within any vision of hope for the future.

Despite some optimism for the global trade union movement, Hyman nonetheless believes that "effective international solidarity is impossible without a willingness to act on the part of grassroots trade unionists, it is unattainable without an active strategy by trade union leaders and activists to enhance knowledge, understanding and identification of common interests cross-nationally" (2002:10). Others argue that trade union learning, possibly via civil society affiliations, should be at the vanguard of challenging global neo-liberal influences that are detrimental to labour, with practical and theoretical examples from around the world being available (Carroll, 2006, 2007; Novelli and Ferus-Comelo, 2010; Cooper, 2007). Trade union debates around the purpose of their education and learning provision thus continue (Tarlau, 2011; Spencer, 2007). The 'traditional' versus 'radical' nature of pedagogical approaches has been examined (Cooper, 2007), as has the extent of accommodation or critical engagement with the forces of neo-liberalism (Hannah and Fischer, 1998; Salt et al, 2000). This includes its

promotion of either the skills based and/or 'knowledge economy' in the UK (McIlroy, 2008; Rainbird and Stuart, 2011).

The response of UK trade union learning provision and member engagement towards neo-liberal globalisation can therefore be seen as both a barometer to gauge learning effectiveness and as a compass to point to the potential way forward within any counter-hegemonic process. If disjuncture exists between the expressed interests of UK trade union leadership statements, learning services provision, and/or local rank and file membership, then any collective challenge to neo-liberal globalisation's race to the bottom is likely to remain compromised. This thesis attempts to explore this largely uncharted terrain. Empirical data regarding worker perspectives within contemporary UK trade unionism in the context of globalism, global mobilisation and the intangible and somewhat mercurial phenomena of 'solidarity', is noticeable by its absence. It is thus in need of the academic attention and research enquiry offered here.

The thesis is also prompted by the author's own observations as a trade unionist, labour educator and learner over a working life. At the beginning of the author's own research journey it was felt that there was little evidence that UK trade unions and GUFs in particular were engaged to any great extent with education for solidarity; or that they fully appreciated the value that members may place on solidarity issues. Thus the author postulates that a high degree of disjuncture exists between UK rank and file union members and global institutions created to represent their interests.

The aims of this thesis can thus be encapsulated within several central research questions. Do UK trade unions offer their members learning opportunities designed to enhance global worker solidarity and if so why? How do trade union members in the UK experience and understand global worker solidarity? What strategic approaches do UK trade unions assume in order to develop learning for global solidarity? If so, what course content and pedagogical methods do they adopt? What supportive learning pathways are available to trade union members undertaking learning for global solidarity?

How effective is trade union learning in generating awareness, understanding and activism in relation to ideas of global worker solidarity? Finally, how effective is learning for global solidarity in providing the transformative experience characteristic of critical knowledge development?

While solidarity can be defined as “a feeling of sympathy shared by subjects within and between groups, impelling supportive action and pursuing social inclusion” (Wilde, 2013), it is much more than this. Solidarities, we suggest, are perhaps better understood as “transformative relationships”. These are characterised by the “active-creation of new ways of relating” between oppressed groups or individuals; they are “inventive” in nature and “constructed through uneven power relations”, with human agency being seen as a primary generative factor (Featherstone, 2012:5/6). Solidarities are thus manifested in terms of human emotions, supportive communications and/or active engagement. This emphasis upon the agential, dynamic, innovative, creative, personal exchanges that shape individuals best encapsulates the understanding of solidarities within this thesis.

Our analysis of why, when and how members enter into a process of personal transformation through trade union learning opportunities that carry them towards solidarity awareness and activism can be encapsulated within what mobilisation theorists understand as “the ways in which individuals are transformed into a collective actor” (Kelly, 1998:25). With the central planks of mobilisation theory involving the process of a growing consciousness and acceptance within individuals of a sense of shared identity, shared injustice and shared interests, then the exploration of these lived experiences by trade union members in this research is seminal to our improved understanding of the phenomena.

The theme of personal transformation also arises within understandings of learning. As this thesis explores the intersection of learning and active trade union solidaristic engagement, Mezirow’s (1990, 2000) transformative learning theory is drawn upon when examining the personal journeys that accompany any adjacent or subsequent movement into activism.

Transformative learning is understood as “the process by which we transform our taken for granted frames of reference to make them more inclusive, discriminating, open, emotionally capable of change, and reflective, so that they may generate beliefs and opinions that will prove more true or justified to guide action” (Mezirow, 2000:7/8). With its central themes of critical reflection, rational discourse and the centrality of experience, Mezirow’s approach will allow us to shed light on not only an individual’s psychological phases of development but also the possible complementarity of the transformative process with that of trade union learning methodologies. The key question here concerns the extent to which trade union learning methods help learners travel through their personal transformative journeys. If the essence of transformative learning is an “emphasis on actualisation of the person and society through liberation and freedom” then can trade union learning provision deliver the necessary teaching methods that actively engage learners, collectively create knowledge, value experience and relate to wider society (Dirkx, 1998:8).

Throughout this thesis the word ‘learning’ is used in preference to those of ‘education’ or ‘knowledge production’, as learning is seen as a much broader term that encompasses formal education, whilst at the same time incorporating informal knowledge acquisition. This thesis examines both informal and formal learning, as provided by trade unions. Classifications of difference between these concepts is notoriously difficult and as Fenwick (2010:80) reminds us, learning needs to be understood not so much as a single object, but rather,

“enacted as multiple objects, as very different things in different logics of study and practice....particularly in the contested arena of work as a site of economic conflict and production, learning needs to be appreciated as a messy object, existing in different states, or perhaps a series of different objects that are patched together through some manufactured linkages”.

Within the complexity of learning occurring at different organisational levels, transmitted through a tangled web of networks, through communities of practice, or as individual human cognitive-skills development, it is the aspect of sense-making and meaning-making within and between individuals and collectives that is utilised primarily within this thesis. The key elements of this approach being rational discourse, critical reflection and the importance of experience, what Mezirow (1990, 2000) and Illeris, (2003, 2010) refer to as transformative learning. This thesis however does not exclusively seek 'deep' transformation, as within Fenwick's (2010) 'messy' appreciation of learning, assimilative or accommodative learning (Illeris, 2003) also feature as adults incrementally construct personal understandings of their world upon previous knowledge acquisition. To offer some clarity to the complex notion of learning, Fenwick (2010) further reminds us that we need to distinguish between the word learning as being used at times as a verb (learning as process) and alternatively as a noun (learning as product). Clarity around the particular usage within the thesis will be made explicit, whilst to identify both usages within the thesis findings should prove illuminating.

The causal links between engaging in learning as a process, knowledge attainment as an outcome, and immediate altered behaviour or enhanced activity as a consequence, remain equally contested. It is thus acknowledged at the outset that any causal link between learning and activism forms a significant problematic underpinning the thesis rationale. Within this thesis knowledge creation as understood by Mezirow (1990, 2000) and Freire (1970), can be seen as constructivist in nature, with the identification of sense-making or meaning-making being at its core. When applied to transformative learning as a knowledge creation process the central significance of human perspective change in relation to personal assumptions, beliefs and values, cannot be underestimated (Dirkx, 1998). This thesis thus sits within a constructivist framework of understanding learning, education and knowledge production and all linkages between learning and acting are sought.

For many trade union members learning and personal development is inextricably linked to worker rights and protection. This places union learning firmly in the arena of being a counter-hegemonic process. Novelli and Ferus-Comelo hold that “knowledge is never neutral, it is located in, and contextualised by, both time and space, and emerges to address historically produced and conditioned problems from the perspective and vantage points of particular actors and interests” (2010:50). This context clearly applies to trade unions and their learning facilitators. For some research respondents the struggles surrounding counter-hegemonic learning, allied to any sense of agency, will remain in attendance as a thematic undercurrent throughout this thesis.

The purposes of trade union learning can be varied in nature, but for the objectives of this thesis it can be categorised into two distinctive camps, what Salt et al (2000:13) refer too as “technical-professional” courses and alternatively “consciousness raising-activist” learning provision. We would add that a spectrum of educational approaches between these two extremes is perhaps a better way of understanding trade union learning. As suggested by the categorisation, the technical-professional position relates primarily to more immediately practical, skills based courses, often seen as more akin to notions of ‘training’. This lends itself to a functional, apolitical, somewhat individualised approach to learning, closer aligned to a human capital model of understanding the purpose of education. Alternatively, the consciousness raising-activist approach is characterised by seeking to develop personal awareness of wide ranging social, ethical and political issues impacting upon workers and their communities, with its intrinsic intention of offering personal transformation leading hopefully to collective action. Any organisation must of course base its learning provision upon its philosophical understandings or ideological positions and Hannah and Fischer (1998) for example, helpfully assist us in illustrating this within a UK-Brazil context, seeing consciousness raising-activist models of education reflecting the differing political and ideological stances of trade unions in these countries.

It must be remembered however that within both approaches outlined above the outcome of any learning journey can never be predicted. All learning is transformative, yet transforming into what is always an open question. As research respondent Robert reminds us from the outset, “education can make you discontented with your lot. One of the good things about education, it makes you realise that a better world is possible and so some people have tried to pursue that”. All the courses examined here fall into the consciousness raising-activist category, a category seen as more hegemonic in nature than that of others within any learning spectrum.

Distinctive ‘learning for solidarity’ initiatives exists within the UK and of the twelve courses under study within this research eight have the concept of solidarity encompassed within their primary or secondary learning objectives. The four that do not explicitly address solidarity have a greater focus upon the phenomena of globalisation, albeit experiences of solidarity remain implicit and surface within these formal programmes. The word globalisation can be seen as a panacea for contemporary worldwide social, political and economic linkages, whilst also being a gateway into a deeper examination and personal accommodation with experiences of globalism. Regardless of individual course titles, any manifestations of synchronicity, complementarity and reciprocity within course outcomes are of interest.

This thesis above all allows the voices of trade union members, union learning facilitators, and to some extent union leaders to be heard through their narratives in an effort to address the questions outlined above. Research respondents’ experiences are employed in an attempt to convey any indications of personal agency, particularly if associated with transformative learning journeys. Indicators of agency within narratives that are explored include the individual’s sense of purpose or choice, their motivational drivers, intentionality, human will and initiative, all wedded to a personal belief that their aims are achievable. Our conclusions can then be positioned within theoretical understandings of agency in terms of learning and personal development. These will appear as a dynamic tension between past educational experiences, present inclinations, the confidence to learn, and

future hopes of achievement, creatively held in equilibrium within a deeply personal iterational process (Emirbeyer and Mische, 1998).

This thesis is organised in the following ways. Following the research project methodology with conceptual framework in chapter two, the literature review is presented in chapter three. This offers a wide ranging exploration of relevant literature, extending over several disciplines.

Placing current trade union formal learning provision and the courses under study in this thesis in some context, forms chapter four. This chapter additionally assist us in addressing the issue of why trade unions provide such courses and informal learning events, drawing as it does on documentary data currently available. If trade union leaders and learning organisers are unclear as to why forms of solidarity learning are currently needed then union members and activists may be equally unclear and lacking in their direction of travel. Collected documentary data provides much of the evidence that begins to answer these questions.

Chapter five provides a requisite entry point into examining trade union member experiences and understandings of solidarity. In constructing an evidence base upon which to address the research questions, worker narratives have been captured from a variety of sources. These include union members who have undertaken a selection of learning opportunities available to them in relation to global issues and worker solidarities, as well as narratives from some tutors who have organised and facilitated learning events. These personal accounts of what solidarity is in the eyes of union members offers a working foundation upon which to proceed.

The remaining sections address learning from formal and informal perspectives. Chapter six looks at formal courses as an arena of transformative learning and engagement and the extent to which they can mobilise solidaristic activity within participants. A variety of courses are examined that explore such themes as global worker solidarity, globalisation, international development, poverty reduction, and the position of women

workers in a world that has 'gone global'. These courses are provided by a variety of trade unions, ranging from the very large such as Unite to the much smaller such as Napo. Twelve formal courses are subject to examination, eight of which contain solidarity construction either explicitly or implicitly within their learning aims and objectives. The discernment of trade union strategies towards developing global awareness amongst members is sought with evidence being gathered into the degree of resources being expended in this area of membership development. Available learning pathways and the manner in which formal learning intersects with informal learning opportunities is also explored. Two tutors offer input through their individual contributions in relation to the learning that they facilitate. This also offers an exploration of the impact and effectiveness of the pedagogical approaches in use today.

Chapter seven focuses upon the place of informal learning within trade union member experiences of transition through self development into activism. The importance and availability of informal learning is explored as an emergent theme resulting from research participant contributions. This chapter stands in contrast to the formal learning events outlined in chapter six. Within this section we can utilise Foley's (1999) suggestion that 'informal learning' occurs when individuals or groups teach each other and learn collectively in such settings as social movements, workplaces, families or other community formats. This is differentiated from 'formal learning' that occurs in educational institutions; 'non-formal' learning that occurs in a range of social environments, yet remains systematic and structured; and finally, 'incidental learning' that occurs everywhere and anywhere within daily human encounters and interactions. We must also constantly bear in mind that praxis, the iterative process of action followed by reflection, leading to further re-designed action, remains in itself a personal learning experience (Freire, 1970). Additionally, our intersecting notion of global worker solidarity is seen here as being located on a continuum of lived experiences as individuals journey from an initial affective response through to supportive written communication, culminating at times in dynamic, pro-active, material engagement or determined behaviour.

As the author has for some time held the role of Union Learning Representative (ULR), an emphasis is placed upon this position within the chapter, with a degree of professional reflection that should hopefully enhance the thesis research materials. The extent to which the role of ULR lends itself to promoting issues of a global nature is of interest. Moore's (2011) research illustrates the hegemonic struggles inherent within labour education and learning in her examination of the position of ULRs within social policy formulation and application. Although research has examined the role of ULRs in the workplace (Moore and Ross, 2008), with findings indicating both its distinctiveness (Shelley, 2008), its contested nature (McIlroy, 2008; Clough, 2010), and its links to government skills development agendas (Leitch, 2006), its place in relation to promoting issues of transnational significance for workers has not been probed. Several of the research participants are ULRs. With regard to ideological battles, the role of the ULR can be increasingly seen as one where individual learners can develop a sense of empowerment, with the possibility of greater inter-union solidarities being generated (Moore and Ross, 2008). These factors are arguably key aspects of any improved UK trade union renewal strategy designed to counter global neo-liberal hegemony.

Chapter eight examines overseas study visits as informal yet distinctive forms of learning activity. Historically trade unions have engaged in demonstrating solidarities with sister unions around the world through visiting each others' countries, either via one-off visits or lengthier exchange programmes. Narratives thus describe visits from UK trade unionists to Cuba, South Africa and India, whilst Majority World respondents describe experiences involving visits to the UK and elsewhere. The extent to which all overseas visits are similarly transformative in nature is of interest here, especially if leading to the discovery of collective identities and interests. If the obstacles of resources limitations and language can be overcome, any possible transformative experience may translate into agential, creative, dynamic activity upon return to the UK. Questions surrounding the extent to which the psychological impact upon visit participants equates with Mezirow's (2000) transitional phases arise here. The role of values held in common and the centrality of experience

combine within study visits to enrich the shared discourse between visitors and hosts. When combined with related formal learning prior and post study visit, the powerful influence of this form of learning experience is, it may be argued, the optimum learning provision available to trade union members. The immediate impact of trade union overseas study visits is therefore examined as a potent and possibly unequalled experience.

Discussion and concluding remarks form chapter nine in which the thematic threads that have emerged from the findings are drawn together and reflected upon. Research questions are directly addressed and placed within the wider context of global hegemonic influences, personal meaning making through learning and individual agency. Difficulties for trade union learning provision surrounding the actualisation of members as identified from the research are outlined. Some suggestions for future trade union learning provision are offered.

Finally, in examining trade union learning and its intersection with the construction of active solidarities amongst members, the adjacent and overlapping arenas of trade union organising and membership decline cannot be ignored. Union revitalisation has been strategically necessary for most unions over the last thirty years as membership has fallen (Hyman, 1994, 2002b). Part of the revitalisation agenda has included an intensive focus upon better organising of member activities and attracting new members (Hyman, 2002a, 2002b). The creation of the ULR role is an illustration of this in relation to utilising learning and education provision as a tool for organising. Research respondent Sheila's mantra of "good organising looks like learning and good learning looks like organising" is indicative of the close relationship between them. This focus of this research is not however on the relationship between trade union learning and union organising. This will only be glimpsed tangentially. Rather, the focus is upon the intersection of trade union learning and mobilising of members in relation to experiences of global activism.

# **Chapter Two: Design, methodology and conceptual framework**

## **2.1. Research design**

This chapter describes the planning, implementation and outcome of the research methods undertaken for this thesis. We start by outlining the chosen research methods of semi-structured interviewing, documentary data collection and participant observation. We then describe the analytical methods used to interpret data before looking at the everyday practical considerations involved in implementing the two year research project. Pre and early stage reading of relevant literature helped to shape the initial design and how this influenced the theoretical framework used is described.

Having personally completed some of the formal learning events under study, the author is required to reflectively and reflexively consider and incorporate his experiences into the research process and findings. As such the positionality of the author needs to be outlined in some depth in this section. This reflective approach includes an awareness of the evolutionary nature of research and how initial planning was shaped and reshaped as the project progressed.

The original inductive project design primarily involved undertaking in-depth biographical interviews with trade union members, including paid officials and tutors, who had undertaken some form of labour global awareness learning or personal development. The time frame for the research data gathering was planned to take place from February 2012 to October 2013, targeting respondents who had completed or participated in a formal learning programme since 2003. This date was chosen simply because it delineated a ten year period proceeding from the completion of the research project, thus capturing the union learning events that were offered within that decade. Whilst being an arbitrary time period, a certain research cut-off point was needed. Interviews were initially planned to be face-to-face and semi-structured in nature, with a detailed research schedule questioning guide

having been designed to offer some degree of uniformity and enabling consistency of responses for analysis (See Appendix A). Interviews were designed to last between approximately sixty and ninety minutes and they were to be recorded with agreement of the respondent.

Whilst designed to draw upon biographical responses, whole life histories were not being sought, but rather episodically important periods relating to the research project focus. It was planned that respondents would be encouraged to reflect upon the role of learning within a global labour context, specifically in relation to developing any personal and collective sense of global interests and agency, perhaps leading to a sense of personal injustice, shared identity or activism.

The semi-structured interview method was initially selected as it provided improved focus within conversations upon the main areas of exploration whilst also allowing for a high degree of narrative response, providing flexibility for the interviewer and latitude for response from the interviewee (Bell, 2010). In relation to aspects of transnational mobilisation and global solidarity, it was the thoughts and feelings in relation to identity, injustice and shared interests that were being sought, essentially, “the understanding of someone else’s world” (Gillham, 2008:45). This foundational position was adopted in order to access uniquely rich data, and dependent upon initial findings, lead to further interviewing. Responses could be compared with previous empirical research findings in addition to documentary data relating to union formal learning programme materials.

Meaning-making and rational understandings by respondents are the key outcomes sought within the narrative approach. Martinez Lucio et al (2007:7) embrace the benefits of capturing “the interplay between the individual actor and social structure”. Personal participant experiences and understandings of agency were certainly sought at the project design stage, alongside awareness of hegemonic influences upon individuals (Bathmaker and Harnett, 2010). Furthermore, human narrative is, according to Polkinghorne, a “primary form by which human experience is made meaningful” (1998, cited in Gillham,

2008:47). The potential usefulness of quantitative research data was initially considered so as to offer a more comprehensive view of the phenomena under study, primarily through questionnaires within a wider survey strategy designed to improve triangulation (Denscombe, 2010). Unfortunately several UK trade unions approached had little data to offer in direct relation to the scope of the research or proved reluctant to release what they had, including the location and acquisition of the PCS materials (PCS, 2008). Thus, unfortunately, little was made available to the author. In due course, interview methods became the preferred methodology as being more advantageous in terms of capturing the subtleties, complexities and intricacies of human behaviour over and above those of quantitative research methods.

The eventual interview data was drawn from some fourteen in-depth interviews in total (See Appendix B). These were conducted in person, by Skype or by 'phone. The research schedule questions were oriented around the central issues contained within the research questions but with scope to explore the wider learning journeys of individuals, as well as asking why and how unions provide learning for active solidarity. It transpired that interviewees responded flexibly and led discussion as they wished, with research questions being placed at relevant junctures within any given discussion. A broader discussion approach was employed more particularly amongst established solidarity activists, union officials and officers, especially as greater emphasis upon the meaning of solidarity emerged as the research evolved. Another eight interviews, largely unstructured, were undertaken at conference events, offering complementary data (See Appendix C). These interviews targeted mainly trade union and labour leaders and examined their understandings of different solidarities. Some very limited yet valuable data from ad-hoc personal discussions with union learners and tutors is also included, with this data being recorded in field notes. This thesis makes no claims for the research sample being representative of all UK union learning provision, but rather to being a snap-shot of learning opportunities and learner experiences within the chosen timescale. Individuals were selected to offer a broader examination of union member movement into activism, primarily through the role played by informal and formal learning events.

The collection and collation of documentary data was also planned within this project. After the immediate challenge of gaining access to materials, it was not anticipated that the validity of documents should present any extensive difficulty. The initially identified data included extant trade union educational programme materials such as the content of all course sessions that have some relevance to global union mobilisation awareness or solidarities development. Denscombe's (2010) essential concerns around authenticity, representativeness, meaning and credibility did not appear too questionable, with a significant level of validity being therefore maintained. Any available post programme review materials were also identified as of value, as were course planning materials. Course content materials were expected to disclose the ideological and political position of given unions and the extent to which this is thematically reflected within interviewee responses was of fundamental interest. It was assumed at the beginning that union educational mission statements or policy papers would supplement other documentary data. At the completion of the research phase documentary data collected and utilised involved course planning materials, course advertising materials and course content materials relating to the specific courses examined in detail. PCS survey data (PCS, 2008) was also utilised within this research methodology.

Participant observation can be valuable as a research method (Bryman, 2008), and whilst not accorded extensive weight at the beginning of the research project, took on a greater significance as events unfolded, particularly as the author undertook one of the formal learning courses examined in this thesis. Recently the Global Labour Institute (GLI) *International Summer School 2013* was attended by the author and the influences of Majority World summer school participants and their experiences as workers proved to be of value to the research findings. Participant observation within this formal course offered the opportunity to collect documentary data and observe proceedings with minimal disruption to the course, whilst allowing for an holistic viewing point into the subjects' understandings of transnational solidarity, essentially providing in-depth

insights into the subtle complexities of a cross cultural learning event (Denscombe, 2010).

Field notes from the GLI summer school were made and written-up on the evening of every day of the course so as to increase issues of reliability. Ethical concerns were addressed through the course essentially being an open arena, streamed live onto the internet. When individual course participants were spoken with or digital recordings of speeches made, then the researcher's position was made clear and consent was acquired (Denscombe, 2010). The particular focus of any observation was that of seeking understandings and expressions of individual, collective and transnational solidarity, especially the politics of this in the context of being actualised across cultures and continents. Pedagogical methods employed, such as lecturing, were also focussed upon within this context. All available documentary data from the course was collected and collated.

Additionally, in terms of positionality it is of reflexive significance that the author had previously undertaken several relevant trade union and labour oriented courses since 2003. These including the GFTU *International Development Champions* course (2005), the TUC *Going Global* on-line course (2008), and the WLRI *Certificate of Professional Development in Union Learning* course (2009). The 2005 GFTU *International Development Champions* course incorporated a fact finding and solidarity building visit to Egypt. The author's biography includes organised study visits to Nicaragua in 1990 with the Nicaragua Solidarity Campaign and a later visit to Palestine with the Palestine Solidarity Campaign in 1992. All of this personal engagement inevitably resulted in informal participant observation which helped to inform my future thesis. However, as the above courses occurred prior to the thesis research being instigated, planned participant involvement did not occur and thus only reflections upon these experiential encounters can be offered here. Aid and development work in Romania during the early nineties also shaped the author's world perspective.

These experiences, as with all other experiential and informal learning undertaken by the author, proceeds from a white, male, European, middle income, background and perspective, freighted as this is with in-built, probably latent, preconceptions and partialities. Rather than attempting to dismiss or ignore the personal impact of these experiences, the author has decided to include not only the influences derived, either consciously or unwittingly, from these life-wide learning experiences, but also to incorporate his formative impressions into this thesis. The courses and travel experiences form, from a reflexive practice approach, key moments within the author's adult learning journey into trade union and labour practices, values, and awareness of UK and global solidarities. The author has been a member of Napo since 2000, the union and professional body for Probation and CAFCASS staff, and continues to be so. Napo is affiliated to Amnesty International and actively supports Justice for Colombia.

Following the planning and subsequent use of semi-structured interviews, documentary data collection and a degree of reflective participatory observation as the primary research methods, the data captured was examined continually via the use of thematic analysis. This involved the use of immediate, open categories of response (themes) being sub-divided, arriving at distinct participant experiences and conceptual notions that were positioned within the theoretical framework. Nvivo computer aided software was considered a useful tool to assist this purpose. Themes were identified from within all forms of data and analysed both descriptively and interpretively. Analysis was also planned to sit within a wider contextual setting of the intersection of individual agency and hegemonic influences within society, with a view to how individuals make meaning of global events and find spaces for counter-hegemonic activities.

With Braun and Clarke "a theme captures something important about the data in relation to the research question, and represents some level of *patterned* response or meaning" (2006:10) that emerges. Of equal importance though is the understanding that "the 'keyness' of a theme is not necessarily dependent upon quantifiable measures, but in terms of whether it captures something

important in relation to the overall research question” (2006:10). The prevalence of a theme within the research project was measured simply by the number of participant voices that spoke on any given topic, albeit as Braun and Clarke (2006) suggest, unique narrative data was utilised within the findings when providing significant, relevant, meaningful import, in the assessment of the author. Themes emerged from the collected narrative data and these were positioned within the conceptual framework in order to enable understanding.

With regard to documentary data, whilst much of this was in written format, the utilisation of other medium such as video, film, pictorial images or CD-ROMS was not originally discounted. Documentary data was analysed through the use of thematic analysis (Braun and Clarke, 2006) in which essential issues, questions and ideas relating to the research aims emerge as sources for investigation through the theoretical framework. The main focus was placed upon what can be defined as primary sources, those currently or very recently in use by trade unions. As with interviews, a thematic analytical approach was used, employing an internally critical examination of the material. Documentary data, interview data, and participant observation data thus enabled a degree of triangulation. All findings were located alongside the conceptual framework, existing empirical data and research questions to facilitate interpretation.

The eventual dominant themes that emerged reflected a number of those located within mobilisation theory, such as injustice, identity and shared interest, and also transformative learning theory, namely rational discourse, critical reflection and the importance of experience. The less anticipated and immediate themes, however, related to a host of issues including those ranging from such participant interests as trade union history to the influence of the media. Analysis of data ranged from the descriptive comparison and contrasting of themes into an interpretive examination in which question of underpinning assumptions, implications of a theme, and conditions giving rise to a theme, were posited.

With regard to the planning and ongoing evolution within the research, a focus group methodology was also anticipated in relation to at least one selected formal learning programme. The planned use of a focus group sat within the strategic approach of individual interviews and documentary data collection. Participation was planned as by invitation and it was expected that a group could be followed from a point prior to their starting an educational programme to a point some time after the programme completion. Of primary interest within this approach was the anticipated collective construction of the meaning of solidarity and the process by which this is developed (Denscombe, 2010). Despite the advantages of this method, focus groups are not without their problems however as the dynamics of any group can lead to the suppression of member views or even an irrational attachment and association with certain topics or individuals (Bryman, 2008). In the event the practical organisational aspects of arranging such groups proved overly challenging in the time frame available as the resource implications were extensive. With ongoing reflection upon what advantages would be gained from a focus group approach this research methodology did not come to fruition as on balance it was felt that sufficient useful data could be gained from interviews. Nevertheless, participation by the author at the *GLI International Summer School* performed a similar function as group discussion was captured from within this event, highlighting cultural differences and varying geo-political perspectives. Certain cultural tensions were clearly discernible within the GLI event and these are reflected in the research findings.

Having looked at the various data gathering methods employed, we can now describe other organisational and practice based issues and concerns involved in planning and executing the research. In terms of courses covered by the planned research it was initially anticipated that between four to six formal union courses would be examined. The twelve courses eventually examined contain a useful diversity of course content stemming from differing political or ideological positions, cover a variety of occupational skills sets, and reflect the varied impact that neo-liberal globalisation has had upon different

employment sectors (See Appendix D). The specific courses selected for detailed study include,

*TUC Globalisation, Gender and Poverty Reduction*

*TUC Diploma in Contemporary Trade Unionism*

*TUC Going Global*

*NUT International Development: It's Union Work*

*WLRI Certificate of Professional Development in Union Learning*

*GFTU International Development Champions*

*GFTU International Solidarity*

*GLI International Summer School 2013*

*Unite Organising in the Global Workplace*

*Napo Next Generation Programme*

*CTUS, BA (Hons) in Labour and Trade Union Studies*

*Ruskin College MA in International Labour and Trade Union Studies.*

With regard to the proposed student or trade union member sampling to be undertaken for this research it was planned that adequate sampling frames would be provided by individual unions, from which suitable respondents would be invited to participate and offer personally meaningful connections between their trade union's position, individual learning journeys and workplace experiences. This purposive sampling approach aimed to supply respondents who have undertaken some form of union or labour educational programme that contains at least an element of a global or transnational perspective. The Trades Union Congress on-line course entitled *Going Global* was at the outset a likely example of one such formal learning programme from which to draw course students. As the research project progressed up to four organisations supplied sampling frames (Napo, GFTU, NUT, GLI) and the respondents chosen for interview were those that put themselves forward. Although many different unions were approached for sampling frames and documentary data, including some of the largest in the UK, it transpired that those who did respond are largely representative of 'white collar' workers. The majority are employed in the public sector. The exceptions to this are Mark and Simon who although seconded to unions at the time of interview, are

employed in the rail transport and banking sectors respectively. Fourteen individuals eventually volunteered to be interviewed in depth to discuss not only their course participation but also their learning journeys over time. An amount of snowball sampling did occur from which participants were selected.

In line with project diversity and equality principles it was originally envisioned that the sampling would facilitate variety in terms of age, trade union, sector, current job skills level, ethnicity, region and gender. To gain some insight into union aims and objectives within international and global union strategies and ideological positions, it was planned that a sample number of course lecturers, managers, and designers would be interviewed, as would senior union officials responsible for international policy as delivered through their particular union's education programmes. As anticipated, data collection from a mix of gender, ethnicity, age, employment sector, region, and differing unions was finally captured within the research. With specific regard to the fourteen semi-structured interviews this included responses primarily from grassroots members, including ULRs (Jane, Mark, Simon, Susan), course lecturers/tutors (Carrie, Mark, Mike, Robert), and an education organising officer (Klaus). Within the semi-structured interviews covering eight women and six men the ethnic heritage of Irish, English, Pakistani and Indian respondents are encompassed. UK regions represented included London, Liverpool, the Midlands, Yorkshire, Sussex and Northumbria. Unfortunately, interviews with senior UK union officials proved unattainable and thus the comments and views of union general secretaries (Bob Crow, Frances O'Grady, James) are recorded via conference speeches. Within the unstructured interviews, the countries of Colombia, Sri-Lanka, Pakistan, India, China and Venezuela are encompassed (See Appendix B and C).

Within this research project notions and experiences of 'solidarity' and 'activism' were from the beginning understood within their widest sense, involving any collective engagement of whatever nature by workers to become active within themselves and demonstrating creative, dynamic support of fellow workers at a transnational level. This could range from direct protest action in support of sister unions in another country, working for

improved environmental concerns, or simply becoming involved in promoting fair traded international goods. Due to contemporary forms of communication, varied understandings of the difference between 'local' and 'global' active solidarity within union members' involvement was anticipated.

Ethical issues, including the safe handling of all acquired materials in a secure and confidential manner, was addressed via use of the London Metropolitan University Research Ethics Review Checklist (London Metropolitan University, 2010a) and the Ethics Policy and Procedures (London Metropolitan University, 2010b). The principles of the Economic and Social Research Council (2005) Research Ethics Framework were also employed. Distinct emphasis was placed upon all intervention with vulnerable individuals or groups. If individuals had experienced extremely negative consequences of globalisation, perhaps through work or travel, or poor experiences of previous education, then possible personal ethical and moral issues may have resulted from the participants' responses. Although academic research can be seen as being in some measures exempt from the duties and responsibilities within the Data Protection Act (1998), as the confidentiality of data and anonymity of participants was to be respected at all times the principles enshrined within it were worth adhering to.

Data was managed securely through password protection and encryption when digitally stored. Paper documents were stored under lock and key. Names and addresses of participants were kept separate from transcriptions. Archived material was kept no longer than was necessary and any eventual disposal involved the complete destruction of data. Bell (2010) usefully reminds us that with all participants, not only must written and informed consent be acquired, but clarity about exactly what 'confidentiality' and 'anonymity' mean for each individual involved must be explored so as to avoid any subsequent misunderstandings. Bell extends this pragmatic and courteous practice with regard to clarity of understanding in relation to possible future publication of findings and both these approaches were practiced.

The overall timeframe for this project was from February 2012 to January 2014. The timeframe outlined below was seen as necessarily flexible in nature as the response of research subjects was beyond immediate and ultimate control. The continuous juggling of various elements of the planned research and thesis production perhaps reflects the reality of undertaking such a project. February 2012 saw enquiries being made into seeking the participation of several unions. Communication was by formal letter, meetings, e-mail and 'phone. February 2012 onwards also encompassed background reading and research of existing literature, including the provision of more recent publications such as, for example, Wilde (2012). The continued researching and examination of existing empirical data associated with the aims of the research project was also an ongoing exercise throughout the first year.

March and April 2012 involved more detailed communication with trade unions and improved access to data and research participants, with face-to-face meetings with union education managers and other involved officials and sample groups needing to be established, followed by decisions regarding suitable interview locations. March to April 2012 was a period in which some initial thesis construction in the form of written material began. From May 2012 to December 2012, and then into 2013, writing continued in draft format. Fieldwork and data collection began to take shape through late 2012 and into the first half of 2013 as tentative analysis of findings also began to formulate and research themes began to emerge. June 2013 to December 2013 was devoted to final thesis completion, leading to printing and binding of the thesis in January 2014. Through the process of constant plate spinning this research project was completed by the deadline date.

This research project was fully funded. Resources such as digital recording equipment, both video and audio, were available to the researcher. Internet use, including Skype, was also available. Of some difficulty was the arranging of suitable venues at which to undertake confidential interviews and it was planned at the initial stages that if in London, the University could provide appropriate rooms. Participating unions were also to be asked to provide

suitable 'neutral' venues for interviews and a possible focus group. Voluntary sector organisations could be asked to offer premises for interviews if necessary. On conclusion of the research phase some fourteen formal interviews (8 women, 6 men) were conducted by Skype or 'phone, with some eight being conducted face-to-face, including some being conducted using both methods, on different occasions. These individuals were drawn from Napo, PCS, Unite, UCU, RMT, and the NUT. Conference speeches were captured using digital recording equipment. All interviews were conducted in private, albeit the interview venues were on occasions somewhat ad-hoc in nature, as circumstances dictated.

In addition to what was planned at the outset, other avenues of exploration arose through time including labour conference attendance, trade union website examination and the capturing of Majority World participant interview data. What was not anticipated at the outset of the project was the emphasis that respondents would place on the influence of informal learning opportunities such as those above. As such the use of materials from transnational labour and/or UK based union conferences also emerged. Annual General Meetings or Conferences began to prove very fruitful spaces for research data to be gathered. These events offered fertile ground for data collection on such subjects as active solidarity by individuals or groups, civil society engagement by unions and differing approaches to encouraging union learning. When combined with participant narratives they also encompassed forms of informal learning that increasingly emerged during the period of the research. The decision to explore informal learning in greater depth stemmed from such events as it became increasingly clear during the research that learning outside of any formal teaching environment was significant for the union members interviewed.

Labour events attended were those of the Napo 2012 Trade Union Conference, the Adelante 2012 Latin America Conference, and the 2013 Labour Research Symposium. Personal narratives and experiences were captured from within these events, including the recording of speeches and this authentic material is used from the outset and throughout this thesis. In

addition to capturing interview materials and contemporary documentary data at such conferences, these events provide extensive learning and developmental opportunities for participants, particularly through informal channels. This was found to be especially so within fringe meetings in which an array of learning and educational resources were available for union members or visiting workers. Such resources include conference speakers, visiting trade unionists from other countries, published materials, colleagues, and internet content.

Trade union internet websites were also unexpected yet fruitful sites for documentary data collection as educational programmes, individual union policy objectives and union international departments' written materials were openly available. Websites of all the unions selected within this thesis were visited. All contained either formal learning or training programmes and all held links to affiliated civil society organisations, primarily relating to solidarity building. Those unions with dedicated international departments include UNISON, Unite, NUT, NUJ, and the PCS.

Labour or trade union conferences were additionally useful spaces to capture understandings and experiences of solidarity from Majority World perspectives as overseas voices from around the globe, including India, Pakistan, Colombia, Venezuela, Sri-Lanka and China were collected as interview data. The research data is enriched through capturing women's narratives, adding invaluable depth to the findings and offering unplanned insights relating to solidarity and its everyday manifestations from Indian and Colombian female viewpoints. The extent to which solidarities are positioned by research respondents on a spectrum ranging from an affective response through to proactive physical commitment is also of exploratory interest. Global perspectives also allow us to make some tentative and limited comparisons in understandings from around the world as differing narrative accounts of class experience, imperialism, colonialism, wealth, and international relations came to the fore and challenge the author's personal position. Increasingly, reflection by the author upon Majority World experiences became amplified as the research progressed.

Within research project design, planning and application, considerable thought and reflection was afforded to the use of language and terminology. Firstly, it is of note that whilst some of the course content examined within the learning events and courses described below is titled through use of the word 'globalisation', the term itself can be seen as being colloquially utilised largely by being part of the *lingua franca* for 'all things global'. As such it can be seen as a gateway into discussion and debate for all worldwide or transnational issues. Where its more specific meaning of intensified spatial and temporal streams of communication, trade and capital flows is employed, this indication is given.

In reflexive terms the process of globalisation has certainly compounded an already complex picture in relation to 'North-South' distinctions relating to unequal power relations and global inequalities. Therefore the term Majority World is employed throughout this thesis. This is designed to replace the geographically inaccurate, socially hegemonic and increasingly outdated terms 'Global South' and 'Third World' (Alam, 2008; Escobar, 2004). Whilst no one term or phrase can be seen as ideally descriptive of all the contested issues at hand, this term is preferred as it attempts to avoid the negative connotations of economic, imperial and colonial oppression associated with previous demarcations. It also attempts to better encapsulate issues of socio-economic disenfranchisement and marginalisation experienced by the vast majority of the world's population, including some in wealthy nations.

The term globalism appears within the body of the thesis, being utilised in the sense of thinking on a worldwide scale and incorporating an attitude and practice of placing the interests of the world before any one social group or nation. This is not to be confused with the term globality and its more specific understanding of the end state of the globalisation process. The term transnational is preferred here to describe activities between and transcending many nations. It is utilised in part to avoid confusion with historical Marxist understandings of labour internationalism.

## **2.2. Conceptual Framework**

The research findings from both the documentary data collection and semi-structured interviews were planned to be located primarily within a conceptual framework comprised of aspects of mobilisation theory. As this involves the intersection of active solidarity with trade union learning, it is supported with aspects of transformative learning theory. At the start it was anticipated that interview respondents would make reference to union affiliations or similar forms of association with civil society organisations and thus elements of social movement studies were also to be drawn upon. Additionally, due to the nature of the subject area, aspects of spatial labour geography were factored into the planning. A collection of interconnected concepts were marshalled together from within varying mobilisation and learning theories and it was this interrelated frame of concepts arising from various academic disciplines that were initially designed to furnish this thesis with its theoretical underpinning. The utility of this interdisciplinary framework lies in its ability to offer explanation and insight into research respondents' experiences relating to perceptions of learning, solidarity and mobilisation within a transnational or global context.

Prior to the outset of the research project, influential literature being read at the time within the arena of labour mobilisation was significantly shaped by Kelly (1998). Supplemented by the work of Klandermans (1991, 1993), Tattersal (2005, 2006) and Moody (1997) this field of literature informed early research design. Herod (2003) provided a wealth of insight into conceptualising the geographic scales of labour involvement from a local to a global level from his particular discipline of labour geography. Such authors as Moore (2011), Bathmaker and Harnett (2010) offered direction in relation to understanding worker experiences of collective consciousness, values, and identities, including those of ULRs in the context of contemporary trade union activism. The literature of Freire (1970) and Gramsci (1971) influenced initial thoughts surrounding personal learning and development.

In exploring why, how and where UK trade union learning intersects with global active-solidarity formation amongst workers, the need to place the research findings within a theoretical framework is clear. Allied to this is an exploration of how trade union learning can foster this process. The framework eventually chosen draws primarily on a combination of aspects from mobilisation theory (Kelly, 1998) and transformative learning theory (Mezirow, 1990, 2000). As we are exploring two overlapping fields of union activity, whilst mobilisation theory will form our central analytical device, academic interest suggests that at least two complementary conceptual understandings are required to address the intersection.

Within this thesis mobilisation is understood as the processes through which individuals access their personal sense of agency then come together with others to act collectively (Kelly, 1998). The utility of Mezirow's (2000) understanding of a transformative process of meaning-making via learning and self development is also adopted as being the sense that individuals construct around experiences, especially in relation to their needs or values. How individuals through learning make things 'add-up' to them personally; how they fit certain shaped psychological pegs into similar shaped psychological holes is sought. Usefully for this thesis Mezirow sees learning and meaning-making as inextricably linked and others have followed in examining adult learning at the cutting edge of meaning formation (Garvey-Berger, 2004).

First we look at those aspects of mobilisation theory relevant to the thesis and its research questions. For the purposes of this thesis we draw upon the essential elements of the theory as elucidated by Kelly (1998). He draws on those writing before him, primarily Tilly (1978), Gamson (1992) and McAdam (1988) and identifies the key aspects of their work in relation to what ignites and sustains collective action as being a sense of individual grievance leading to collective injustice; the need for a shared sense of identity and common interests; the role of leaders; and the attribution of responsibility and blame for the causes of any perceived injustice. In an effort to locate our research findings within a conceptual framework of explanation, analysis and improved

understanding, it is these five primary elements that are utilised in this thesis, especially those of injustice, shared identity and common interest. For Kelly, injustice is seen as the *sine qua non*, that element without which mobilisation could not and would not occur. It is a sense of injustice that leads individuals from a personal grievance to engaging in collective action. Still utilising Gamson (1992), agency comes to the fore as individuals believe that collectively they hold not only an entitlement to their grievances being addressed, but they also hold the hope that their requirements or demands can be met.

Following Tilly (1978), Kelly identifies a sense of shared interest as the sustaining element within any understanding of mobilisation, including the processes of how a group of individuals reach a point of shared definition of interests and the extent to which sharing occurs. The third key element found within mobilisation theory is that of a shared sense of social identity. As Kelly explains, within understandings of individual and social identity it is accepted that individuals can switch between a sense of individualism and collectivism at will, dependent upon the context, environment or situation they find themselves in. Leaders and leadership are further elements as the process of mobilisation needs one or more individuals to frame injustice issues, promote the causes at hand, communicate with all involved and motivate others into collective activity. Kelly's fifth key element within the process of mobilisation, that of attribution, refers to the extent to which the reasons or causes of injustice are attributed to others, often through blame. This places questions of 'truth' firmly within the scope of the process of mobilisation.

Mobilisation theory has not endured without some critique and its limited analysis of the contingent relationship between economic change and collective action is questioned (Martin, 1999). Other examples of its analytical limitations include constructive employer-employee relationships as Kelly's (1998) conceptualisation of power dynamics come under academic scrutiny (Gall, 2000). Similarly, the contradictions in the capitalist labour process are seen by some as being of primary influence with regard to mobilising workers, over and above issues of justice (Atzeni, 2009). Notwithstanding all critical

comment surrounding mobilisation theory, in relation to this thesis it is the discourse regarding attribution, leadership and injustice that is most relevant. In terms of attribution for example, Martin (1999) argues that examination is lacking within Kelly's work in relation to employer framing of issues and employee acceptance of their expressed positions, whilst for Darlington (2002) lack of weight is afforded to the influence of union leaderships in shaping collective action.

Turning to the bedrock of Kelly's (1998) theory, Martin (1999) suggests that he offers a shallow understanding of the roots of injustice as ethical and moral positions are what essentially inform an individual's value base. These are highly personal and thus individualistic. For Martin prior values are pivotal in determining what is 'just' and 'unjust' for individuals and as such need greater academic attention and supporting empirical data from Kelly to further validate his theory. For Atzeni (2010) the meaning that individuals bring to understandings of injustice is so subjective, individualistic and indeterminate that it cannot form a basis for theorising collective activity. This lack of attention to notions of injustice sits alongside Gall's (2000) view that the rationality and supposed 'predictability' of mobilisation theory leaves insufficient room for human emotions and experiences such as self-confidence to prevail within analysis. Limitations relating to a lack of empirical data to support his argument and bounded conceptual depth regarding key aspects thus appear on a number of levels to challenge mobilisation theory as presented by Kelly (1998).

Allied to notions of what activates and collectively mobilises individuals to behave in a solidaristic manner, we need to also identify how labour and trade union learning fosters the circumstances necessary for personal actualisation. Theories of transformative learning enable us to do this. Prominent amongst transformative learning theorists is Mezirow (1990, 2000), who in approaching learning from a developmental psychology standpoint has sought to develop a process of personal perspective transformation involving the cognitive, affective and conative domains of human nature. This is the ability of adults to learn how to change the sets of assumptions, beliefs and values that they

have acquired through processes of socialisation, essentially entering a “movement through time of reformulating reified structures of meaning by reconstructing dominant narratives” (Mezirow, 2000:19). There are four ways in which learning occurs for Mezirow; via individuals mentally and intellectually “elaborating existing frames of reference, by learning new frames of reference, by transforming points of view, or by transforming habits of mind” (2000:19). Critical and rational reflection around an individual’s core beliefs and behaviours are central to Mezirow’s approach, supported by dialogue leading to alternative actions being undertaken by those in both formal learning and general adult development.

The psychological and cognitive foundations of this theory led Mezirow (2000) to define ten key phases within any transformative learning process. The first three phases relate to personal dilemma or disorientation in an individual’s life, resulting in self-examination (primarily of emotions) and a subsequent critical assessment of one’s assumptions (beliefs, worldview, etc). The four mid-phases relate to recognition that one is not alone in having such experiences, exploration of options, and future planning that includes the acquisition of new skills and knowledge. The final three phases relate to putting one’s plans into action through tentatively trying-out new roles, building self-competence and confidence, and finally, embedding one’s reintegration into new found perspectives. This is alternatively referred to as objective or subjective reframing. Transformation itself is seen as occurring either incrementally, that is steadily over time, or in an epochal, ‘road to Damascus’ manner. It is these ten phases that will be utilised within this thesis to identify where our research subjects may be within their personal transformative learning journeys, with emphasis placed upon the latter, more physically active phases.

In a further attempt to structure our findings for the purpose of analysis Johns’ (1998) taxonomy of trade union course ideology is drawn upon. This follows Hannah and Fischer (1998) and Salt et al (2000) in their usage and slight adaptation of the categorisation of underpinning ideologies. With courses ranked on a four point scale from ‘accommodatory’ to ‘transformatory’ the

taxonomy can be drawn upon to assist in addressing the research question relating to long term strategic approaches of the trade union courses under study and their position within wider union beliefs systems. The four levels of categorisation of solidaristic course content range from a Level Zero for courses having no relevance to globalisation and solidarity; to Level 1 in which courses promote solidarity at a local level in relation to protecting local living standards over others; to Level 2 in which the course content promotes transformative solidarity through encouraging workers to see themselves as possessing shared class based interests with workers in other countries; to Level 3 in which all local or national linkages are discarded as the course content places all workers within an international class, without borders. In drawing upon Johns (1998), our research needs to focus on the trade union delivered courses and not those provided by higher education establishment as these contain less of an overt political or ideological aspect. We also need to recognise that neither Johns, Hannah and Fischer, nor Salt et al, draw upon learners themselves or the pedagogical approaches that they encounter as research material. It is further recognised, with Salt et al (2000) that any comparison of courses can only be made in very broad terms and inevitably contains a high degree of subjectivity. Nonetheless, the exercise remains of utility.

Following Freire (1970) and Mezirow, emancipatory and transformative learning can be traced within the UK labour movement through the American Highlander School of labour education, as initially promoted and practiced by Horton (TUC, n.d) as 'active' learning. Pedagogical approaches closely associated with transformative learning principles have been adopted by the TUC (n.d.) and can be accepted within the context of this thesis as being generally utilised across the spectrum of UK trade union education. For union learning facilitators the principles and practices inherent within transformative learning equate well with the traditional value bases of trade unions, namely justice and fairness, equality and equity, democracy, and unity (TUC, n.d.). They also chime well with Mezirow's emphasis upon the importance of tapping-into learner experiences, engaging in critical reflection and promoting rational discourse. This forms a useful gauge for the findings within this thesis.

Before we proceed further we need to undertake a brief detour into exploring the related notions of human agency, hegemony and the framing of ideas. Inherent and yet somewhat latent, not only within theories of mobilisation and active learning but also within the discourse surrounding these notions, lies the issue of human agency. As Kelly (1998) suggests, when workers talk of a sense of entitlement and belief in achieving their aspirations they enter the domain of self-agency. A sense of self-efficacy being associated with achievement in all major areas of life, including learning, work and social life, is emphasised by Gecas (2004). Indeed for Hammond and Feinstein (2005) learning reinforces self-efficacy and for Bandura (2006) the closely related concept of self-belief in ones ability to achieve one's aims plays a key role. Bandura makes further distinctions between intentionality, forethought, self-reactiveness and self-reflectiveness as being the four essential properties of human agency, with its three modes of existence being found in the individual, collective and proxy domains. Biesta and Tedder (2006) see agency not so much as a personal capacity but more of an outcome of action, conditioned by environment and context, creating an ecological understanding in which levels of agency fluctuate and learning throughout life plays a pivotal role. Lambe (2006) locates agency within a temporal, dynamic and developmental context, with individuals possessing a sense of personal control.

Individual agency is seen by Emirbayer and Mische, (1998) as under theorised with their research identifying agency as related to motivation, intentionality, will, initiative, and with a sense of purpose or choice, all allied to a belief that personal aims can be met. Within this understanding, aspects of past, present and future dominate as they interact in a creative dynamic, albeit the extent to which one or other aspect is dominant at any point in time or in what context, will vary. The iterational aspect of agency looks backwards and creates a foundational base upon which an individual can operate. Projective agency looks to the creating of a desired future, whilst the practical-evaluative aspect generates present day activity within individuals. As Emirbayer and Mische put it, a "chordal triad of agency within which all three dimensions resonate as separate but not always harmonious tones"

(1998:972). The same authors place significant emphasis upon the importance that context plays in influencing the balance between the chordal tones. It is this dynamic balancing act between past, present and future, found within the respondent narratives that shall assist analysis within this thesis.

With an understanding of the notion of personal agency we can begin to apply this to a consideration of the global context. Heron's (2008) study places the exercise of human agency firmly in the arena of globalisation and its attendant ideology of neo-liberalism, identifying these phenomena as having been presented and adopted by global institutions as the primary paradigms for international development. Whilst further identifying the agential greed that drives the proponents of neo-liberalism, who simultaneously attempt to mystify human relationships, Heron also presents some core principles that in her view should form any preferable approach to international development from within a globalisation-development paradigm. From a Majority World perspective, developing individual and collective agential capacity through education, health provision and improved nutrition is first amongst her proposed principles. Greater opportunity through improved equity and equality are requisite if personal and collective agency is to be developed further. Improved security from all forms of harm is also required if individuals are to meet their personal aspirations and fulfil their potential, all supported by the advancement of human rights legislation around the world. For labour educators in the UK, Heron's work therefore not only locates the agency that fuels materialism amongst defenders of neo-liberalism, but also to some extent challenges the perspectives and content of labour educational course in the Minority World.

Weighing heavily upon experiences of individual agency are hegemonic influences. Hegemony can be understood as a more complex, subtle and nuanced understanding of the forces of state power, control and influence at the disposal of any given ruling elite. These are forces that not only physically coerce certain classes to remain in subaltern positions, but also elicit from them an ideological embracing of the class structures of which they are part and, more importantly, which contribute to the furtherance of their own

subjugation. It is Gramsci's (1971) understanding of the influences of civil society as an arena within which political parties, trade unions and workers acquire limited rights from the bourgeois classes that is of relevance here. Civil society is the space where ideas and beliefs are transmitted, primarily via educational establishments, the media and religious institutions, to perpetrate hegemony and develop popular consent.

Gramsci formulated the idea of counter-hegemony, seeing the necessity for ideological change. Key to his thinking in practical terms is the notion of informal educators or organic intellectuals (Gramsci, 1971) arising from within the ranks of the mass of the less wealthy population and fostering the transformation of the collective and individual socio-political consciousness of the working classes through intimate dialogue. Allied to this is Gramsci's belief that every individual has the innate capacity to both comprehend their world and transform it, particularly when made aware of knowledge as socially constructed and usually placed at the service of legitimising social systems and structures. Additionally, learning for Gramsci is an active pursuit, not simply a passive response to acquiring received knowledge, holding as he does the belief that working and thinking are inseparable and that acquiring knowledge should be viewed as a 'job' or 'apprenticeship'. Requisite education is not an automatic gift but requires effort and endeavour (Jones, 2008). The use of self-reflection is also a Gramscian concept that is encouraged in order to critically challenge the established powers within the socialisation processes of the day.

Turning to the notion of framing, as with Kelly (1998) we can usefully draw on the work of Benford and Snow (2000) in this field. For these writers, when entering the realm of individual ideas and collective ideologies we are also entering the realm of individual and collective meaning-making, primarily through the politics of establishing and disseminating significant beliefs and the construction of 'reality'. Individuals within any framing process are seen as dynamic, active agents who come together to form and espouse collective action frames that assist in interpreting the world around them. Frames of thought are usually designed to challenge existing dominant cultural

ideologies. As understood by Benford and Snow, they “enable individuals to locate, perceive, identify, and label occurrences.....help to render events or occurrences meaningful and thereby function to organise experience and guide action.....collective action frames are action-oriented sets of beliefs and meanings that inspire and legitimate the activities and campaigns of a social movement” (2000:614). Benford and Snow also make it clear that they see collective action frames as differing from those used within the schema of individual psycho-social examinations and understandings of social movements (Klandermans, 1984) in that “collective action frames are not merely aggregations of individual attitudes and perceptions but also the outcome of negotiating shared meaning” (Gamson, 1992, cited in Benford and Snow, 2000).

Additionally for Kelly (1998) in labelling the interests and perceived ‘rights’ of any given group within a mobilising process, framing also highlights the key features of any relationship, as well as the exchange processes between different parties in that relationship. Insightful empirical material can be found in Adler’s (2012) recent account of the use of collective action frames in the Mexican Oaxaca movement as she identifies oppositional, pre-figurative and common origin frames as being most prominent in developing collective identities to support action. With regards to research respondents’ comments, alongside labour educational materials and course content, it is thus necessary to keep an analytical eye on ideas of agency, hegemony and framing as we proceed within this thesis.

Finally, to remind ourselves, our working understanding of the meaning of solidarity shall approximate to that of Featherstone’s (2012) view of an active transformative political relation, a relation that stems from individual agency and grows through practice, fuelled by unequal power dynamics and containing inventive and generative human elements. Featherstone also helpfully prevents us from forgetting that solidarities can become gendered and racialised in their make up, embedding oppressive power relations rather than contesting them.

## **Chapter Three: Literature Review**

### **3.1. Globalisation, labour organising and trade union learning**

Somewhere between the end of the last millennium and the beginning of the new, global labour and its organisational representatives were hit by the shock that was the phenomenon of accelerated globalisation (Waterman and Timms, 2000). Although not a new phenomenon, an urgent response to neo-liberal globalisation appeared requisite and trade union learning services came to play a key role in any collective response to the increasing domination of capital, its supporting ideology and issues around union global renewal strategies. Driven by forces within the process of neo-liberal globalisation, unions and labour organisations also had to respond through improved organisation. As such they have expended extensive resources in attempting to organise differently, all against a backdrop of declining UK membership numbers since the onset of the neo-liberal period.

This chapter begins with a brief journey through the above notions and their associated literature as they act as the primary drivers of the need for increased labour transnationalism, globally oriented mobilisation and more innovative expressions of world-wide solidarity, these being some necessary tools to counter global capitalist reorganisation. The chapter then provides an oversight of the key literature and debates that place labour learning and education within its wider context.

Following a brief overview of both neo-liberal globalisation and labour organising, this chapter undertakes an examination of the key thematic literature relating to this thesis, namely that of conceptualised and applied notions of solidarity and the linkages with theories and applications of mobilisation. This is followed by examining the nature of trade union learning and how this dovetails into labour and trade union engagement with civil society. Subsumed within these more dominant discourses, albeit not themselves extensive in nature, it is also necessary to consider the attendant

themes of women's advancement through trade union learning, and finally the ever expanding influence of internet facilitated education and development of workers.

Examination of all the above is required if we are to begin to address our research questions, relating as they do to the strategic educational approaches adopted by UK trade unions in the context of developing global union mobilisation and solidarity; the meaning and various understandings of solidarity and mobilisation, especially in the experience of grassroots workers, leading to individual and collective endeavour; and the extent to which UK trade union education fosters a collective sense of shared interest, injustice and identity in relation to global contexts. It is by placing these questions within a theoretical and empirical framework that progress in understanding is to be made.

### **3.2. Globalisation: a contested notion**

The published material in both book and article form relating to the understanding of the process of globalisation is vast, covering economic, historical, anthropological, sociological and political literatures, expanding as it has since the 1970's and involving a diverse body of material and authors (Guillen, 2001). The vast array of produced material may also indicate the highly contested nature of the phenomenon and indeed many continue to see it as elusive and vague as a concept (Perraton, 2003). What understanding and agreement that does occur has generally placed most academic understandings into three broad camps; the hyper-globalists, the sceptics, and the transformationalists. Hyper-globalists literature (see Ohmae, 1995) places emphasis on aspects of globalisation that indicate a new era for the world, an era in which the principles of the free market become universally imposed, resulting in a decrease in the power and influence of the nation state as global capital marches inexorably across a borderless world.

Sceptics emphasise the economic enhancement of the three leading global economic zones, those of North America, Europe, and the Asia-Pacific region. For sceptics the process is more one of internationalisation as certain nation states continue to hold power and influence over economic forces (see Hirst and Thompson, 1996). Literature relating to the transformationalist position (see Giddens, 2002) emphasises a process of change in which all nations and peoples around the globe are entering into a far more interconnected world, politically, economically, culturally, militarily and spatially. Within this literature discourse global systems and networks in all arenas of human organisation are becoming more qualitatively integrated and inter-dependent in what is seen as more of a process than an end in itself (Held et al, 1999). It is within this latter understanding that this thesis research is located as trade union learning and active solidarity sits within a complex meshwork of human interactions.

In terms of processes, 'flows' and systems, Harvey's now well documented phrase, that of "time-space compression" (1990:326), captures in a nutshell any intuitive understandings of globalisation within the literature. However, cultural and ideological aspects remain hard to capture within the literature as these aspects of globalisation also remain highly contested, with issues such as women's rights, environmental protection, labour rights, gay rights and a host of other values based issues contending for attention and resolution, both locally and globally (see Guillen, 2001). Integral to the ideological discourse is the position of those who place class creation and perpetuation at the heart of the matter, with Harvey (2011) typifying this view as he perceives the associated neo-liberal ideology as a project "designed to restore and consolidate capitalist class power" (2011:10).

Also of more immediate relevance to this thesis is the impact of transnational neo-liberal ideology upon education, including labour formal learning, and the engagement of trade unions and labour organisations with wider civil society and social movements. The latter will be addressed separately below, but with regard to trade unions utilising further and higher education colleges in the UK, globalisation has presented challenges. The ideological struggle of which

Harvey (2011) refers has led in large part to the greater privatisation, marketisation and commodification of higher education (Newman and Jahdi, 2009; Wedlin, 2008) and for trade union and labour learning this has meant having to facilitate their particular approach to member academic development within a neo-liberal commercialised culture. A further literature addresses the challenges faced by labour and trade union educators in this ideologically driven environment (Levidow, 2002; Spring, 2008; Brown and Yasukawa, 2010).

### **3.3. Organising: labouring in a cold climate**

The issues surrounding organising embrace and envelop any trade union learning agenda as the two activities share a symbiotic relationship. Since the onset of the neo-liberal era organised labour in the UK has suffered through falling trade union membership numbers and density in nearly all sectors of employment (Heery et al, 2001), with an ongoing debate relating to how best to develop and employ strategies to foster trade union revitalisation (Frege and Kelly, 2003). New models of union structuring have been proposed as solutions with the prevalence and apparent advantages of the 'organising model' perhaps holding sway over the 'servicing model' (de Turberville, 2004; Holgate and Simms, 2008).

Allied to this discourse is that of the possible benefits inherent within embracing 'social movement unionism' and 'community unionism' (Wills, 2001; Taylor and Mathers, 2008; Simms and Holgate, 2008; Klandermans, 1991, 1993), with the interwoven themes of improved organisation and alternative forms of democracy or power sharing within trade unions being debated at both a European level (Voss, 2010, Vandaele and Leschke, 2010) and on a global scale (Waterman, 2001; Moody, 1997). The union organising debate and discourse has explored and evaluated the potential effectiveness of reaching out to local communities, with Tattersall's writings (2005, 2006) offering us an academic pathway into this discourse via her framework of understanding that ranges from 'ad-hoc' to 'deep' coalition formation with civil

society organisations. Each stage of coalition formation requires and incrementally establishes ever greater trust, joint decision making and associated power sharing between parties. For Wills (2001) the obvious benefits of common cause alliances include unions widening political influence, reaching non-union workers, accessing 'hard to reach' workers and helping with defending union issues, although for de Turberville, the practice of unions adopting an organising "pick and mix" (2004:789) approach within strategic planning offers little scope for renewal. Some of Simms and Holgate's written work struggles even to find a single UK wide organising model, but rather a "toolkit" (2008:11) of organising practices. For Heery et al's understanding, a process of "managed activism" (2001:1004) has emerged.

Labour organisations in the UK, in particular the TUC, have produced research and subsequent literature on the interdependent relationship between organising and learning as they encourage affiliates to learn to organise and organise to learn, providing case study literature of the benefits of integrated learning and organising (Moore and Wood, 2007; Moore, 2009). Suffice to say at this juncture, with the continued dominance of neo-liberalism, despite the foreseeable financial turbulence of recent years (Harvey, 2011), this discourse continues with the efficacy of any emphasis upon learning remaining under scrutiny (McIlroy, 2008). Within the globalisation literature relating to improved worker organisation around the world, inevitably lies the notion of global labour 'solidarity'. It is to this concept that we now turn.

### **3.4. Labour Mobilisation: getting globally active**

The literature surrounding theories of mobilisation and their application is vast and ranges across many academic disciplines, including sociology (McCarthy and Zald, 1977), anthropology (Mills, 2003) and geography (Herod, 2003). Additionally it spreads along a continuum leading from micro-mobilization of a few individuals to mass social movements across not only continents, but the globe (Waterman, 1991). In addressing our research questions we focus here

on the literature relating specifically to labour organisation, trade union mobilisation, and any intersection with education and wider learning.

For this thesis, the body of useful literature surrounding theorising within the arena of labour mobilisation has its roots in a more contemporary period originating with the seminal and influential article of McCarthy and Zald (1977) in which the idea of resource mobilisation assumed prominence. Subsequent literature draws heavily upon this work and in more recent times labour mobilisation 'theory' has been heavily influenced by Kelly (1998), drawing as he does on the work of Tilly (1978), McAdam (1988) and Gamson (1992), amongst others. As mentioned previously, Kelly is of most help with assisting us in answering our research questions, albeit all these writers share an interest in how individuals develop a sense of collective, how and when they organise collectively and what leads individuals to some form of activism. Notions of injustice, social identification, shared interests, collective organisation, opportunity, the attribution of blame or responsibility, and the role of leadership, all resonate as key components within their understanding of 'mobilisation'. Essentially, these authors attempt to wrestle with what exactly motivates individuals to pursue goals of common interest and undertake this in a collective manner. More recently the findings of Atzeni (2009) bring mobilisation theory into contemporary perspective from a Marxist position.

In expanding notions of individual or small scale worker mobilisation to a wider social movement level, the writings of Klandermans (1991, 1993) offer and exemplify a wider social perspective and understanding in attempting to explain such phenomena, including trade unions collectively engaging with other societal actors. Whilst sharing an understanding of the essential components of what drives and enables individuals to act collectively, an additional component suggested by Klandermans (1984) relates to value-expectancy theories in which personal cost-benefit calculations are undertaken by trade unionists and others contemplating involvement. Associated literature exploring the 'framing' of motivational factors relating to mobilisation has expanded over recent decades and is now understood as being integral to any in-depth analysis and understanding of what motivates,

directs and sustains oppositional groups on both a local and/or global level, including civil society, trade union and labour groupings (Benford and Snow, 2000). All the above are of value in assisting us in understanding what motivates, enables or prevents individuals or groups engaging in active solidarity.

### **3.5. Civil Society Engagement: forging community links**

Many research respondents may experience their pathway into global labour activism through the lens offered by civil society organisations that are possibly affiliated to their particular union (PCS, 2008). As stated earlier, understanding union-community organising is not the primary theme of this thesis and as such only a brief synopsis can be offered here in order to locate and better appreciate notions of learning and forging active-solidarity within their wider community context. Of relevance however is the literature relating to how learning and activism occur within community alliances or wider social movements, the spaces and sites of their formation, and the pathways to solidaristic activism that follow. The literature is difficult to locate and needs to be quarried from far and wide. Novelli (2004:2010) offers us a useful entry point with his work on the linkages between globalisation, labour and knowledge formation in the global arena of worker resistance to the forces of neo-liberalism, offering a case example from Columbia followed by wider examples from around the globe. In tracing the literature further a thread can be found that explores how collective learning within social movements is fostered (Kilgore, 1999) and how social movement theory explores and understands the associations with activism (Bevington and Dixon, 2005).

Sitting within the global community coalition discourse we also find the literature on the advancement of women within trade unionism, within mobilising, and within global activism (Mills, 2003). Again, in relation to learning and solidarity building a small literature exists in relation to advancing women's education and in particular through separate trade union education courses for women (Greene and Kirton, 2002; Kirton and Healy, 2004)

Synergy with the literature on women's identity and consciousness development is inevitable (Greene and Kirton, 2002). This literature may sit adjacent to that on wider diversity issues including transnationalism from a migrant worker perspective and the role that learning and agency plays within this global labour issue (Lee, 2006). This represents, however, only a small body of mainly conference papers and journal articles.

Also located within the margin where global labour organising overlaps with learning for global solidarity and activism, we find utilisation of the dimension of cyberspace and its earthly manifestation, the internet. As Harvey has identified "time-space compression" (1990:p326) as being a key aspect of globalisation, with digital communication and the internet playing a central role in the compression process, research and literature relating to labour and trade union learning has grown. As we have seen, whilst global labour organising themes within the literature can vary from issues of power, democracy and decision making processes, as well as identity and roles or the power of networking (Ward and Lusoli, 2003), it is the use and efficacy of the internet for trade union and labour 'distance learning' that is of interest in this thesis. The literature represents themes of not only the practical efficacy and necessity for labour education and learning on-line, promoted by such agencies as the International Labour Organisation (ILO) (Belanger, 2007), but also, in light of notions of informal and life-wide learning outlined above, the challenges that networking brings to such issues as union power structures and systems (Shelley and Calverley, 2007:221) identities and roles (Martinez Lucio and Walker, 2008). These challenges to workers, their representative organisations and decision making structures, all sit within the context of global internet communication and the progressive learning opportunities offered by alternative global social forums (Waterman, 2001).

We can see in summary how the literature at the intersection of trade union learning and trade union active-solidarity formation is limited in extent. This is in stark contrast to the monumental literature relating to the wider context in which it finds itself, namely contemporary globalisation and its ideological influences. Labour learning and organising literatures share a mutually

supportive relationship, fostered in part by labour and trade union attempts to challenge the dominant contemporary ideology of neo-liberalism and its political and social manifestations. Situated deep within some of this literature lie the voices of workers around the world and their experiences of working, learning, and getting active. It is hoped that the research within this thesis can not only contribute to those voices, but offer some degree of explanation through the framework of understanding offered by theories of mobilisation applied to the context of trade union education.

### **3.6. Solidarity: a collective understanding**

The word solidarity is a much used term, yet one that is under theorised and needs to step out from the shadows (Wilde, 2007). As discussed earlier, neo-liberal globalisation has presented significant consequences for transnational labour solidarity in both its theoretical and practical application. As such, in responding to the research questions we must attempt to demonstrate the wide variety of conceptualisations and practical applications of the notion of solidarity. Although derived in part from the personal or collective context of its promoters, we will remain within the domains of labour and social movement theories. We must also ask if essential elements of understanding are discernible and if the concept can be divorced from its everyday application.

In exploring the meaning of solidarity in the context of transnational movements influencing national political and democratic arenas, Schwartz (2007) surveys historical-philosophical positions pertaining to common identities, collective care and respect and within a context of active justice, as being foundational to any understanding of the concept. Examining the formation and expression of dissident knowledge within justice movements on a global scale, Hosseini (2010) in turn finds himself examining notions of injustice, identity and shared interests founded upon principles of democratic governance and equality. In terms of embracing 'others', he draws on the understanding of the World Social Forum, noting, "The expression of this diversity [gender, age, rural-urban, employed-unemployed, migrant, etc] is our

strength and the basis of our unity” (WSF, 2002). Diversity is thus the basis of solidaristic unity in the view of the WSF as it justly challenges the power, privilege and interests of those practicing sexism, racism, violence and excessive capital accumulation. In attempting to capture the intellectual aspirations of global justice organisations and movements and seeking to implement them in an integrative fashion, Hosseini (2010) echoes the view that progress is to be found in achieving the affirmation of collectiveness and commonality without losing aspects of individuality. This includes challenging systems without losing sight of individual identities.

Still operating at a global level, Hosseini (2010) helpfully structures the realisation of solidarity in three primary forms of expression; namely liberal-globalist solidarity, hegemonic solidarity, and revolutionary solidarity. Liberal globalist solidarity appeals to fundamental human rights and norms that are inclusive of all individuals and assist in furthering their cause. Hegemonic solidarity relates to the collective dominance of groups of actors, primarily through cultural domination, whilst revolutionary solidarity is based upon the sharing of material interests and espoused through an all encompassing ideology.

The theme of solidarity as an ever evolving, fluid and dynamic process emerges for some writers (Bieler and Lindberg, 2011). They draw on and utilise the understanding of Mohanty who sees solidarity as “an achievement, the result of active struggle to construct the universal on the basis of particulars/differences” (2003:7), Bieler and Lindberg constructively emphasise the non-automatic nature of solidarity for trade unions. Again for Bieler and Lindberg, agreeing with and citing the work of Mohanty (2003), it is important to remember the pro-active political struggle, praxis-oriented aspect embedded in the idea of solidarity when developing a sense of identification with others. For Bieler and Lindberg, if global solidarity amongst workers is to prevail then the Western tradition of understanding it through the construction of hierarchical social and moral orders has to be countered. Additionally, the self-centred egoistic approach of laissez-faire or neo-liberal ideologies further presents a challenge to global labour solidarity in particular, to be addressed

through the practice of “intensified human contacts” (Bieler and Lindberg, 2011:10). Facing the perplexing riddle surrounding the opportunity for human agency to prosper within wider social structures, as Bieler and Morton remind us (2001), remains key to fully understanding solidarity in expression and practice. Hansen (2009) further typifies this theme as she utilises Dean’s work (1998) to advocate that “reflective solidarity is not ‘we against them’ , it is a ‘we’ in process, constantly produced, reproduced and transformed through dialogue” (1997:4).

Empathetic feelings and a sense of shared responsibility, held by all within a group, leading to the essential ingredients of mutually supportive action and being prepared to share, also form essential aspects of what is meant by solidarity in the estimation of Wilde (2007). For him solidarity involves mutual support containing emotions of sympathy, reciprocity and responsibility within groups (2007). Crucially, he also reminds us of the hidden paradox at the centre of the concept, as at once it displays implications for universality and unity whilst simultaneously “it exhibits itself most forcefully in the antagonism to other groups, often in ways which eschew the possibility of compromise” (2007:173). Whilst holding with others that solidarity is a dynamic, developmental phenomenon, growing as it does through struggle, Wilde usefully reminds us that the history of solidaristic communities, including trade unions, is littered with exclusionary and discriminatory practices in which “solid was not necessarily harmonious or fair” (2007:174). This is what Featherstone (2012) refers to as the ‘dark side’ of the concept of solidarity with its inherent and paradoxically divisive nature and potentially oppressive manifestations. Mohanty (2003) for example importantly illuminates some less attractive aspect of union ‘solidarity’, namely the systemic male sexism inherent within trade unionism and even differing understandings of solidarity amongst women’s movements around the globe, driven in large part by wealthy, white, Western perspectives.

There exists a limited literature relating to unsuccessful attempts at establishing solidarity (Fine, 2007), again, perhaps offering insightful lessons into what it does not represent or how it does not develop in everyday

practice. Tensions between understandings of the synthesis of notions of diversity and unity surface within academic debate as for some the historical focus upon identity politics and developing common interests can be exclusionary, creating an 'us against them' mentality (Hansen, 2009). Interestingly, in asking if sectionalism is useful for creating solidarity, McBride (2010) answers in the affirmative, as she enables us to better understand the concept by outlining its antithesis, as workers divide into groups and sections, individually seeking their own interests (2010).

In relation to the understanding and practice of solidarity from a Majority World perspective, the body of literature is available and ever growing, at times illuminating inherent tensions between Minority and Majority worlds (Mosoetsa and Williams, 2012), but sometimes coalescing more around specific shared issues in relation to labour education (Cooper and Walters, 2009). In terms of bridging cultural divides in order to challenge dominant ideologies, whilst Wilde (2007) can appreciate the value of a 'bottom up' view of global solidarity, not based solely upon a sense of shared morality, he incisively questions the extent to which widespread solidarity can be achieved in the face of the power of the state within a competition based global system. For Evans (2010), common agendas and the development of shared cultures are crucial to the understanding of labour solidarity, especially if it is to overcome parochial based identities and grasp the opportunities to counter the dominance of global neo-liberal capitalism. The thematic thread within the solidarity discourse relating to the challenge of neo-liberal individualisation and differentiation is beneficially developed by Hansen (2009) who sees this as a key threat to any expression of global solidarity formation.

As with Majority World adoptions of understanding, adaptations to context, and self applications of notions of solidarity, women's perspective literature has developed a persuasive discourse relating to relevant issues and concerns. Themes of gendered power relations are evident within the literature as differences in power need to be taken into consideration if any meaningful solidaristic practice is to occur, whilst women's specific labour education must be fully considered (Colgan and Ledwith, 2000, 2002; Greene

and Kirton, 2002). Approaching the subject from a black and ethnic minority women's perspective Healy et al's (2004) research advantageously typifies and highlights the role of personal value systems relating to the ideological and social functioning of trade unions, as being essential in any appreciation of solidarity formation and collective action. For Healy *this* must prevail over aspects of the immediate and individualised approaches fostered by neo-liberal globalisation agendas promoted within the employment arena. Healy et al (2004) hold that key to motivating minority ethnic women is a sense of injustice, in line with Kelly's (1998) influential understandings.

Within the literature that locates solidarity within a structural and class understanding it would appear that for Hyman (1998) some commonality of interests and shared consciousness of identity are the key elements leading as they must to a sense of collectivism. Challengingly for trade unions, Hyman sees the traditional expressions of union solidarity as either historically illusory and unattainable, a utopian myth, or outdated in their mechanical mode of construction. For Hyman, 'organic solidarity', similar in nature to Durkheim's (1933) conception, is the only viable future understanding and form of global expression. As such, networks must prevail over hierarchies of organisation, with multi-modal forms of communication and organisation prevailing if both the concepts and practices of union and worker solidarity are to survive and flourish. Perhaps Stirling represents the views of many within any solidarity discourse from a class perspective in holding that effective and successful solidarity on a global scale is reliant upon class identities being realised by all (2010). In attempting to utilise aspects of movement theories, an analysis of class inequality and exploitation based upon Marxist and Weberian understandings, leading to worker self-organisation, would certainly be seen by Frundt (2003) as a key thread within any understanding of international labour solidarity formation.

Waterman's (2001) initial and straightforward understanding of the meaning of the term solidarity is that of a community that shares interests and feelings, leading to collective actions (2001). This understanding captures for Waterman the ethical and fundamentally human aspects of sharing that

underpin human relationships, in which any sense of identity creation finds its value in the process of its formation. This is an understanding that appears none too distant from traditional trade union values of mutuality, reciprocity and collectivity. Any understanding of solidarity is for Waterman founded upon notions of liberty, equality, peace, tolerance and emancipation. He develops this understanding further by building upon and expanding historical concepts of identity, reciprocity, affinity, complementarity, and substitution. Whilst seeing aspects of these traditional understandings as somewhat freighted with unhelpful and latent meanings, he suggests that they form a foundation for assisting us in escaping from some of the older notions and travel more towards future understandings and practical use of this complex notion and its everyday global application. For Waterman, understandings of solidarity need to remain constructive, developmental, and democratic, with a humanistic link between the local, regional, national and global. He encourages us, with Harvey (1990), to “Think globally, act locally; think locally, act globally”, whilst adding, “Think dialectically; act self-reflexively” (2001:240), presumably in part to counter any solely European and gendered perspectives.

Theoretical difficulties remain however and for Featherstone (2012) any understandings that too readily emphasize near automatic, almost prearranged, outcomes are too deterministic in nature. Similarly those emphasising any goal based rational choice approach can lead to a far too reductive understanding within any similarity versus dissimilarity, simple binary, understanding. Creative, innovative, agential and personally transformative experiences are key to solidarity formation in Featherstone’s more grounded and immediately accessible understanding. It is this agential, innovative, creative and transformative appreciation of how to think of solidarities that best supports our understanding within this thesis.

In terms of building upon traditional notions of solidarity, without letting divisive aspects prevail, Waterman acknowledges the complexity and multi-faceted nature of the challenges for workers and their respective organisations, located as they are in specific places. Nevertheless, if democracy and plurality remain key aspects within any future solidaristic approach, the

forces within globalisation and contemporary globalism can assist the process as the changing nature of work drives global labour towards increased interdependence. Waterman further advocates that if the journey towards global identity formation can overcome the less attractive elements of traditional approaches, then “global solidarity can thus be seen as less of a duty, of ourselves or others, than as an adventure in which all are potentially involved” (2001:p239).

Within all the above literature, we discern attempts to theorise solidarity as a concept that cannot be divorced from its practical application as its essence is in part intrinsic to and derived from the process of its formation. Within this thesis a process of personal transformative journeying from embryonic agential awakening to full and active participation informs our understanding of solidarity formation. Solidarities will be seen from a subaltern perspective as an innovative, dynamic, praxis lead experience of challenging injustice, forming a journey in which every participating individual offers some personal generative experiences. An experience in which, whilst the final destination is unknown, will lead to some degree of personal growth. Within this growth, personal meaning-making will occur. This places us firmly in the debate between understandings of the relation between personal, social and structural influences. Further, it would seem that the notions of grievance or injustice, identity or consciousness, allied to shared interests or common cause also remain central to any conceptualisation and understanding of solidarities formation. It is the themes of shared experiences of injustice, identity and interest that form central planks of mobilisation theory and as such this thesis will utilise not only their immediate overlap but additionally where they intersect with UK labour and trade union learning. Next however, examinations of solidarity in practice need exploring before we can progress further and it is to the very limited empirical findings embedded within the literature to which we now turn.

### **3.7. Solidarity: previous empirical findings**

We now have a clearer understanding of the extensively used notion of solidarity. Moreover, we have perhaps identified elements of empathy, reciprocity, shared identity and common cause, all in the face of injustice, as some of its central planks. Consequently, examination of previous research studies and any academic literature that has attempted to explore solidarity through trade union learning is requisite. The literature pertaining to solidarity education is, as ever, scant, yet it does at times contain a thematic glimpse of the perspectives and experience of grassroots workers and their learning providers. It is important to capture within this thesis the voices of grassroots trade union members and other worker experiences as it is held that they are a barometer of any bottom-up understanding and development of solidarity formation. Inevitably and inextricably worker experiences, personal reflections and meaning-making are linked to encounters with neo-liberal globalisation, mass mobilisation, a collective sense of justice and equity, and personal learning and development, be it formal or informal. As such, a broadly encompassing overview of the research literature in this field is offered, presenting themes of active worker solidarity, labour education programme delivery, the impact of globalisation upon workers in their communities, the voices of worker learning experiences, and the extant UK survey data.

Castree (2000) offers us an interesting contemporary starting point with his literature on the 1995-1998 Liverpool dockers' dispute and the viewpoint of grassroots workers involved in that particular labour struggle. Examining issues from the discipline of labour geography Castree suggests the need for a better understanding of the multi-scalar dynamics involved within the arena of global labour solidarity, emphasising the organic and 'bottom up' nature of that dispute. Whilst focussing primarily upon aspects of the notion and experience of solidarity formation, worker learning experiences were also explored. Contemporaneously, Wills' (1998) writings and research voices speak of paradoxes involved within international labour solidarity development as trade unions look both outwards to challenge the world-wide political

economy yet instinctively retreat inwards when facing the challenges of globalisation.

A further exception to the paucity of material in this arena is that of Ryland (2007) who in an effort to capture grassroots and branch level trade union voices in the context of labour internationalism undertook research into the experiences of UNISON members subsequently analysing the findings within a conceptual framework of international labour and global civil society theorising. Whilst capturing a rich diversity of viewpoints, Ryland's findings also encountered a degree of both lack of knowledge amongst grassroots members as well as some clear hostility within entrenched parochial attitudes. Although the role of union education and learning did not feature extensively within Ryland's work, some data was collected. This related to the motivational power and sense of solidarity formation inherent within learning about what other workers experience in other countries and what can be learnt from union internationalism sharing its successes and failures. Similarly, Brown and Yasukawa's (2010) work explored the commitment towards and values held in relation to union education in Australia. This was examined through the responses of senior education officials within several unions, all within the context of the growing complexity of contemporary unionism facing the consequences of neo-liberal ideology and the need for greater global solidarities.

Although very limited, empirical findings relating to the impact of forces of globalisation upon workers and UK communities do exist. In addition to Garrett et al's semantic findings (2006) and taxonomic approach, the work of Mackinnon et al (2011) is of relevance with reference to their investigations into the relationship between globalisation and its impact upon workers and their local communities. This wide ranging study found that far from being in a position to take advantage of the empowering opportunities that many ascribe to processes of globalisation, the communities explored found some individual and community experiences to be marginalising and far from empowering, with a patchy and uneven distribution of any potential benefits within global economic flows. The Mackinnon et al study focussed predominantly upon

what may be termed the structural 'mechanics' of globalisation before that of any underlying ideological dimensions.

With regard to the literature and research findings being explored here, existing worker voices can be found and drawn upon through, for example, the work of Ross et al (2011) and their examination of the learning journeys undertaken by trade union members, some of whom expressed views that "the only way we can compete in Europe, never mind the world, is if we educate our youngsters" (Ross, 2011:18). Glimpses of worker experiences in relation to global forces may also be gleaned from narratives found in such powerfully written accounts as 'The Goose That Laid the Golden Egg' (WLRJ, 2009) in which the voices of its ULR contributors cannot escape the local, national and global political and ideological influences impinging upon their thinking and activism. Their collective response to McIlroy's (2008) assertion that ULRs are New Labour created neo-liberal policy instruments, simply "surrogates for social partnership and collective bargaining" (2008:305), is of noteworthy analytical interest.

Contemporary literature surrounding worker experiences of identity within a globalised world subject to the dominant neo-liberal ideology is available (Kirk, 2010) and within Moore's (2011) exploration and examination of evolving self-perceptions of social identity and class awareness a theoretical and empirical framework can be found for locating and contextualising the place of her respondent's voices within contemporary trade unionism. Differences in the degree of emphasis and resource allocation that unions place upon global issues is expected to emerge within this thesis and unions that invest in exploration of the experiences of their grassroots members (Ryland, 2007) and perhaps subsequently continue to invest heavily in related learning programmes may well become apparent within any findings.

Lastly, as discussed earlier, in terms of structuring and categorising an understanding of the practical applications of solidarity, Salt et al (2000) provide a wide ranging comparative study that sits in close proximity to the area under study in this thesis. They examined the content of ten worker

education programmes; three in the United States, three in Europe and four in the Majority World. Salt at al employ Johns' (1998) taxonomic approach as a framework for analysis and assessment. Trade union members involved in the planning and delivery of worker education programmes involving globalisation were interviewed and the findings categorised within either 'accommodatory' or 'transformatory' approaches. Whilst capturing the views of education providers, in contrast to this thesis, learners themselves were not however selected for interview. This small body of literature is complemented and updated by explorations of the impact of certain trade union educational approaches in three Eastern European countries since the fall of communism in 1990 (Croucher, 2004).

### **3.8. Trade Union Learning: a transformative experience**

When we turn our attention to the central theme of this thesis, namely where trade union learning intersects with global union solidarity, we find only a very limited literature. What exist is largely subsumed within a greater discourse on the impact of the processes of globalisation. In addition to this we need initially to briefly venture through the literature on how adults learn and how UK union education draws upon this to establish any distinctive pedagogical approach to fostering transformation in individuals. This portal must be travelled through as it is instrumental to understanding how trade union learning services approach the whole subject of not only global solidarity knowledge formation, but how grassroots members access and appropriate learning.

Today an extensive body of literature relating to how adults can be transformed through learning (OECD, 2003) particularly in the workplace (Illeris, 2010), is available, with Knowles (1973) pioneering the notion of distinctive approaches to adult learning methods. Knowles' 'andragogic' understanding involves adult learners progressing best within groups and learning collectively and this collectiveness dovetails naturally with trade union value systems, with aspects of distinctly communal learning (Lave and

Wenger,1991) also being present. Some articles attempt to relate this to trade union education as a 'community of practice' (Ball, 2003). Andragogic approaches also emphasise self-directed and self-motivated learning with an element of personal goal setting and challenge through problem solving.

Knowing 'how to learn' is also of importance for adults and this includes an element of self-reflective activity. Adult learning principles require learning to be contextually relevant and as such formal trade union learning attempts to relate much to the workplace and wider labour issues, drawing as it does on the experience of individuals and groups. Any difference however between specifically union learning and adult learning in general may for some commentators be indistinguishable. (Ross, C, personal communication, 21.12.11). The related idea of 'life-wide' learning as taken up by Ecclestone et al (2010) draws on all aspects of an individual's life experience. These are complemented by the research literature relating to learning within an individual biography or 'life-course' and the association with concepts of personal agency (Biesta and Tedder, 2006). Material depicting adult learning journeys from the worker perspective (WLRI, 2009; Ross et al, 2011; Unionlearn, 2008) is limited yet available and of direct interest to this thesis.

The lifelong learning debate for trade unions sits within this discourse, with the primary areas of discussion relating to vocational skills development and employability concerns resulting from government policy approaches, to the place of social justice and wider active democratic citizenship formation. Key questions relating to what exactly trade unions want from lifelong learning and how this informs any global strategy also resound within this discourse (Payne, 2001a; 2001b). Study visits as sites of informal learning remain little explored, although commentators outline the difficulties faced within notions of mutuality as cultural and political misunderstandings can prevail. Suggestions of 'un-learning' and re-learning are thus emphasised within this literature discourse (Martin, 2008, 2012).

In terms of its overall philosophy of learning, if we accept the TUC approach as typifying UK trade union learning principles in general, then it is clearly

indebted to the literature of Freire (1970) and Mezirow (1990, 2000), and acknowledges the transformative nature of this for both its learners and tutors (TUC, n.d). For both Freire and Mezirow the themes of personal experience, rational discourse and critical reflection appear salient within any transformative process. They are also inextricably associated with personal meaning-making through learning (Mezirow, 2000; Garvey-Berger, 2004). The value base expressed here is explicit and includes such concepts as fairness and justice, equality and equity, democracy and unity, with all these underpinning values being transformative and emancipatory in nature. Although unacknowledged, it also draws on the field of research literature relating to andragogic learning practices as described above, this understanding being primarily characterised by the TUC as 'active learning' or 'experiential' methodology (TUC, n.d.). The lesser theme of trade union education being of a distinctive nature is evident (Shelley and Calveley, 2007) and the ability of trade union education to access 'hard to reach' learners is available (Stuart and Robinson, 2007). It is perhaps true that andragogic principles bring with them particular challenges, especially when delivered in a complex and ever shifting workplace environment (Fenwick, 2010).

Any philosophy of education or distinctive approach that trade union learning may utilise within the UK and globally forms the backdrop to its attempts to facilitate and foster worker solidarity through personal development. In relation to trade union learning and issues of globalism, transnationalism, mobilisation and solidarity, the field of literature is more limited with a resultant narrower discourse, with any clear distinction between union learning and globalisation vis-à-vis union learning and solidarity being difficult to detect. Stirling, within a wider edited account, offers us his view of the position and requirements of labour education within a global context (Shelley and Calveley, 2007), whilst Bieler and Lindberg (2011) typify the small yet expanding discourse on how unions and labour organisations can learn from each others global initiatives and experiences. Most of the fragmented journal literature focuses upon specific country examples and/or case studies, perhaps relating primarily to regions such as India, Southern Africa, South

America, USA and Canada, and Asia-Pacific including Australia. (see for example, Babson, 2000; Bolsmann, 2010)

Lesser yet equally important themes of transnational difference occur within this literature and these may relate to cultural and/or ideational issues, that in turn resonate with inherent Majority-minority world tensions that need addressing within global labour education. Shelley and Calverley (2007:221) identify trust building through trade union educational programmes as being crucial whilst also noting the Majority-minority world comparisons relating to the necessity or otherwise of skills based learning over political or classed based approaches to worker education (see also Hannah and Fischer, 1998). Educational worker exchanges that explore the understanding and development of democracy also enter into the body of empirical work and literature (Cooper and Walters, 2009). A small yet continually emerging literature relating to reciprocal learning from the perspective of the Majority World continues to develop (Mosoetsa and Williams, 2012).

As much trade union learning and development occurs within informal or incidental learning environments, such as labour conferences, the literature on learning outside of highly structured, classroom based, tutor led formal programmes is drawn upon here to assist us in progressing along a continuum from informal learning to formal. Foley (1999) is helpful here through recognising that ideological contestation is inherent within informal learning, as with formal learning, and is important to the cultural and social processes of reproduction or transformation. Colley et al (2002) assist us in understanding that rigid, formulaic divisions between 'informal' and 'formal' learning are of limited use and that any attempt to create distinctions have to focus primarily upon understanding the socio-political context of the learning before the technicalities of place or form. Freire (1970) reminds us that the iterative process of action followed by reflection, leading to further re-designed action, that is praxis, constitutes an educational experience in itself, whilst incidental learning is seen here as that which results from everyday human experiences (Marsick and Watkins, 2001). Notions of 'informal' learning, that

undertaken outside of the highly structured and organised learning environment, have also been influenced by Saljo (1979).

## Chapter Four: Union Learning

Having gained some appreciation of the literature surrounding this topic of enquiry, this chapter outlines contemporary UK trade union formal learning provision. This overview must be undertaken before examining the findings so as to place formal learning opportunities within some contemporary context. The chapter then proceeds to detail the specific courses studied in this research.

### 4.1. Context

The overriding issue in relation to addressing the question of why learning surrounding transnational solidarity is provided remains simply the consequences for trade unions and workers around the globe resulting from neo-liberal globalisation. This is manifestly the prevailing theme that drives all before it, whether presented in an explicit manner or a more implicit way within documentary course materials. The resultant union responses then fall into several categories in relation to how individual unions choose to react through their formal learning programme provision. The categories, or sub-themes, resulting from the documentary findings reflect concerns with how unions organise globally, the position of women and work, achieving justice for workers, union global learning, and unions formulating a better understanding of their place in an increasingly globalised world.

Starting with Unite, one of the largest UK unions, the written materials supplied to course attendees reflects union policy that states explicitly why solidarity learning is offered to members. For example, in the words of their Deputy General Secretary;

“We have to organise internationally. Only then can we help create a more sustainable economy, with decent jobs for all that combat poverty, as well as address the ecological threat facing humankind from climate change.....such global changes make the international organising strategies of our trade union movement more important than ever. We cannot restrict our thinking and actions to Britain and Ireland alone. We

need to build new forms of practical solidarity and new global organising initiatives, and also integrate global perspectives into our local organising activities wherever this makes them stronger.....we must not forget or allow employers to ride roughshod over the outstanding achievements of the international labour movement. The fact that all workers everywhere have fundamental human rights, no matter who we are“ (Unite: p2).

Whilst making reference to solidarity and workers' rights, the core message within this strategic declaration is that of organising at a local, national and transnational level if the cause of workers is to be globally advanced. This can be achieved through organising around climate change issues as much as any other. The GLI *International Summer School* programme suggests a similar approach to that above in that “union members want an international political alternative to neo-liberalism and corporate capitalism”, yet find a “political vacuum” (GLI, 2013:3) in which trade unions lack collective transnational direction and ideological underpinning.

The GFTU *International Development Champions* course and the TUC *Going Global* course place more of an explicit emphasis upon ‘international development’ work and justice issues, referring to poverty, ill-health, unequal wealth distribution, and worker exploitation. Not surprisingly the TUC *Gender, Globalisation and Poverty Reduction* course takes a similar approach but with greater emphasis upon how women are impacted upon by the consequences of neo-liberal globalisation. Whilst each course may adopt a particular perspective, the majority include some form of organising aspect, sitting alongside a solidarity building aspect. Again these are positioned upon a spectrum of explicit or more implicit presentation.

With regard to the courses that can be seen as more ‘academic’ in nature and delivered within a college/university setting, themes of organising emerge in the form of union reflection and inspection upon their position in an ever changing world. They contain examination and conceptualisation surrounding such issues as union renewal and revitalisation as a means of challenging not only their own decline in terms of membership, but also how to conceptualise organising within a global context. In encouraging course participants to

explore, think conceptually and critically analyse global union matters, more advanced courses such as for example the London Metropolitan University-CTUS BA (Hons) and MA allow space for students to arrive at their own reasoning into why learning opportunities designed to enhance worker solidarity are offered. The WLRI *Certificate of Professional Development in Union Learning* course emphasises the place of labour and union learning within any broader organising agenda.

Before proceeding to examine research respondents' experiences in relation to the formal courses explored within this thesis, and indeed the contemporary informal learning context in which they are located, we need to briefly outline the current provision with regard to labour and trade union structured learning programmes in the UK, from 2003 onwards. This shall be confined to learning programmes relevant to the central issues of this thesis, up to and including Masters level, whilst also describing in more depth the particular courses and overseas visits studied within the research project.

Current courses available to trade union members relate primarily to those offered within union education departments' formal structured programmes. Here we look at examples from the larger unions and labour educators forming the primary focus within this thesis, namely the PCS, Unite, NUT, UNISON, UCU, RMT, NUJ, TUC and GFTU. The focus is primarily upon the larger unions as they have more extensive resources at their disposal, as compared to smaller unions, such as Napo, who tend to affiliate with the GFTU in order to provide members with greater educational opportunities. The majority of research respondents are members of the various unions listed above. While all these unions currently deliver skills based, organising related programmes involving such courses as, for example, Safety Reps, Learning Reps, Equality Reps and Members' Workplace Reps etc, courses containing a transnational or global perspective are somewhat harder to locate.

Unite offers a comprehensive range of formal course similar to those outlined above, but more pertinent to this thesis offers a European Health and Safety

course, a European Works Council course, and a Women's National Week event. Directly relevant to this thesis is the *Organising in the Global Workplace* course provided residentially over five consecutive days and presented under the slogan of 'No-one can believe they don't work in a global workplace'. The broad aims of the course are to 'strengthen our union by thinking globally' and 'agree strategies for a global fightback'. The primary topics covered involve understanding the world economy; understand global unions; and building branch level solidarity via the internet.

The educational methodology of involving guest speakers and films is employed on the *Organising in the Global Workplace* course, leading to a degree of 'action planning'. The other interesting aspect of the course is to map organising by 'brothers and sisters in the South' so as to better understand how 'workers around the world can inform us here in the UK'. This additionally gives the opportunity to 'offer real solidarity around the world'. Further, Unite offer an extensive range of conferences relating to differing groups within the union, many of these providing informal learning opportunities for their members. They also co-sponsored the 2013 GLI *International Summer School*, held at Northern College, South Yorkshire, offering an example of shared and coordinated learning provision amongst unions.

The NUT course guide for the school year 2012-2013 offers courses for teachers, Reps and local officers, but none containing an international perspective. Members can access the NUT's extensive international resources at their annual conference and the union has strong links with its GUF, Education International. The only specific course relating to global issues remains the *International Development: it's union work*, as studied within this thesis.

Another union with extensive educational and international departments is UNISON. Much of their 2013/2014 educational programme is organised regionally and contains for example several courses solely for women. More pertinent is a course offered by the UNISON Midlands Region entitled Branch

International Officer training. Targeted at local Branch level and in particular the Rep role of International Officer, this brief course identifies how different unions from around the globe can learn from each other and how International Officers on behalf of their respective Branches can forge links with other union Branches in differing countries in an effort to meet UNISON's international objectives.

Of note amongst the larger unions is that of the PCS who currently offer no courses with a transnational aspect, despite having an international department within the union. PCS members can access GFTU courses. Smaller in scale amongst unions considered here are those of the RMT, UCU and NUJ. The RMT offers a course entitled *Winning in the Global Workplace*, amongst an array of others including one women only course and a maritime health and safety course. The UCU direct their members towards TUC resources. The NUJ provide no courses of immediate relevance to this thesis, but they do direct their members to the affiliated GFTU. The union Prospect have offered courses and one-off learning events since approximately 2007 and continue to do so. They structure their events around categories of exploring Corporate Social Responsibility, the Millennium Development Goals (MDGs), Procurement and Supply Chains, and developing International Development Advocates, the latter incorporating the formation of direct Branch level links with localised overseas projects and campaigns.

Individual affiliated trade unions can of course point their members in the direction of the TUC or GFTU, as they continue to provide courses directly relating to global issues or events that contain some form of transnational dimension within them. Examples within the TUC remain the on-line *Going Global* course, the taught *Diploma in Contemporary Trade Unionism* and the *Globalisation, Gender and Poverty Reduction* courses. The GFTU 2013 educational calendar offers affiliates an *International Solidarity* course that looks at the role of GUF's, NGO's, and global campaigning, followed by a related *International Trade Union Rights* course that explores trade union human rights, the role of the ILO, alongside the mapping of the abuse of trade unionists around the world. Both are weekend courses over three days

With regard to higher education colleges with a labour and trade union orientation in the context of this research, we have Ruskin College, Oxford, and the Working Lives Research Institute (WLRI), incorporating the related but autonomous Centre for Trade Union Studies (CTUS). The latter two sit within London Metropolitan University and offer in 2013 courses ranging from Certificates to Master of Arts degrees. Ruskin College's provision ranges from a Certificate of Higher Education in International Labour and Trade Union Studies through a Bachelor's programme to a Masters programme of the same title. It also offers a Master of Arts in Women's Studies. The WLRI in conjunction with CTUS offer a *Certificate of Professional Development in Union Learning* (specialising in trade union learning, health and safety or industrial relations), Bachelor of Arts, Master of Arts and Master of Research programmes in Trade Union Studies (again, with an opportunities to specialise in health and safety within the Bachelor of Arts pathway). The Global Labour Institute (UK section) holds a one-week residential *International Summer School* on an annual basis, with the school being sponsored by a raft of unions. Aside from the larger UK unions, the less publicised sponsors include, the IUF, PCS, GMB, RMT, UCU, BFAWU, BWT and ITF.

Much of the funding for the non-university based courses examined in this thesis originated from the TUC and its partnership arrangement with DfID. This £756,000, three year agreement was formulated in 2006 and extended into 2009. Through the TUC-DfID Strategic Framework Partnership Arrangement (SFPA), individual trade unions were able to access funds for training that promoted the shared aims of increasing understanding and awareness of international development issues; forming closer ties with 'Southern' unions; and strengthening partnership working between the TUC, its affiliates and DfID representatives, particularly overseas (TUC-SFPA, 2008). The SFPA was followed by the two year TUC-DfID Partnership Programme Arrangement (PPA) running from 2009 to 2011 and amounting to £2.4 million. Some unions undertook membership surveys funded by these monies with the objective of attempting to quantify to what degree their union

members were interested in studying transnational labour, global solidarity or international development issues.

The PCS survey serves as an example of this material. As a source of data the findings from the PCS 2008 member survey are illuminating. It indicates that in general the majority of respondents are involved in international issues outside of the workplace, through civil society organisations such as Oxfam or Amnesty International and that international solidarity is an important issue for individual respondents and the union as a whole. Of key interest to this thesis is that some 38% of respondents expressed an interest in participating in a course to learn more about campaigning on international matters. Interest in environmental concerns also featured highly in respondents' replies to the survey, whilst of further interest is the number of respondents who did not find global solidarity, campaigning or educational issues to be of importance.

#### **4.2. Courses examined**

The starting point for our exploration of formal trade union courses must be with the largest labour learning provider in the UK, TUC-Unionlearn (See Appendix D). Most interviewees had either facilitated or participated in several TUC courses. These were the *Globalisation, Gender and Poverty Reduction* course, the on-line *Diploma in Contemporary Trade Unionism* and the on-line *Going Global* course. The thesis author has completed the *Going Global* course. With all courses in this section, some remain ongoing whilst others no longer run.

According to collected documentary data, the *Globalisation, Gender and Poverty Reduction* course was designed with a target audience of more experienced individuals, namely trade union reps, organisers, officials and tutors in order to build union capacity amongst this group. The course is not currently run but remains available. Course aims included an exploration of the uneven effects that globalisation has had upon the different genders;

exploration of the union approach to improving working conditions for women; and planning a workplace or local union based activity. More detailed course content involved examining the role of unions in achieving the MDGs and advancing trade justice, alongside improved understanding of the concepts of globalisation and international development. The two day course was not solely for women participants. It was delivered at Congress House, London.

The other TUC course of interest to this research is the on-line *Diploma in Contemporary Trade Unionism*, expressing amongst others the learning aims of enhancing participant understandings of trade union values, in addition to improving personal confidence within students. This course remains available to learners. As the title suggests, this course is aimed at union activists and officers wanting to study at a somewhat higher level and offering students a pathway into professional union posts and higher educational opportunities. Whilst the course content is divided into the four sections of the historical development of unions in the UK, the current position of unions, the future of unions and the final module devoted to study skills and research, it is the 'trade unions and globalisation' element that is of particular relevance to this thesis. This section is sub-divided into looking at globalisation's relevance to unions in the private sector and public sector. The course is run at intervals, online, and spread over three terms, amounting to thirty-six weeks in total.

The final TUC provided course is the *Going Global*, again delivered via the internet and trailed as an introductory entry into exploring key global issues as international development, globalisation, poverty, trade justice and migration, with an emphasis on the part played by working people within these areas. Two learning outcomes directly relevant to this thesis are those of studying solidarity and building activism amongst workers worldwide. This course is described in this research project from the perspective and experience of the author as a participant. The on-line course continues to be offered to TUC affiliated union members.

The NUT course studied within this research is entitled *International Development: it's union work* and includes such broad course aims as raising

awareness of international development issues, working with NUT partners overseas and exploring the part that teachers can play in reducing poverty worldwide. The course is still available, if demand requires. Within these aims more specific course content relates to discussing the difference between globalisation and international development, exploring international teacher solidarity in practical ways, and defining the global civil society agents affiliated with the NUT, Amnesty International being one example. The work of the NUT on the global stage also informs course content, including issues such as the lobbying of governments in defence of the rights of trade unions. Active involvement and campaigning are key strands of the course and these involve encouraging individual participants to utilise 'planning forms' and 'to do lists' for use on return to the workplace. Engaging colleagues locally also forms an integral element of the course. When provided, this is a two day residential weekend course.

As the NUT course is located firmly within the wider context of primary and secondary education, so the Working Lives Research Institute certificated course is located firmly within a higher education context. Titled as a *Certificate of Professional Development in Union Learning* it offers, as the name suggests, an opportunity for workers involved in supporting adult learners to develop their understanding of the place of trade union, labour and lifelong learning within a fast changing and globalised world. This course no longer runs at the WLRI in London, but is being offered elsewhere. With a view to empowering students by offering a learning route into further higher education, its aims are several fold. They include an exploration of the contemporary UK skills agenda; an exploration of the wider issues behind government learning and skills policy; and the aim of examining how trade union and labour learning sits within the wider context of worker organisation and union renewal. The four modules comprising the course involve looking at the historic struggle for labour educational advancement, ways of learning for adults, labour organising, and of pertinence to this thesis, globalisation and its impact upon labour and trade union educational provision. It is this fourth module that is the primary area of interest for this thesis. The course is taught one day per month over a two year period.

At degree level we explore the Bachelor of Arts (BA) degree in *Labour and Trade Union Studies* offered by the Centre for Labour and Trade Union Studies, London Metropolitan University; and the Ruskin College Master of Arts (MA) in *International Labour and Trade Union Studies*. Both courses continue to run. The BA contains several modules that deal with international issues. These are structured around the themes of political economy, which begins from a theoretical perspective that examines globalisation and the spread of neo-liberalism around the world. Secondly the course contains a module which looks at the European Union and the countries within the European Union. Then the course moves onto comparative labour and trade union studies, which offers a world-wide perspective around labour issues. One of the primary aims of the degree is to encourage students away from an immediate focus on workplaces and unions and begin to think about the context in which workers and unions operate, which is one of internationalism, both theoretically and practically.

The Ruskin College Masters in *International Labour and Trade Union Studies* places an emphasis on the need for global labour movement renewal in the face of crisis resulting from aspects of globalisation. Through conceptual, critical and analytical study the MA explores the roles and identities of workers, union democracy and leadership, and forms of member inclusivity as some of the key factors involved in global labour renewal. Cross cultural comparisons of union and labour practice are available as the course adopts an international perspective.

The two remaining educational programmes studied within this research differ somewhat from the previous in that they contained the opportunity for participants to visit an overseas country, all of which were located in the Majority World. The first of these was the General Federation of Trade Unions' (GFTU) *International Development Champions* programme that was comprised of both a three day taught component and for some of the students an overseas visit to either Egypt or South Africa. This was a one-off event. One of the prime objectives of the programme was to offer grassroots

participants the opportunity to experience at first hand the conditions faced by fellow workers in another country and to personally forge solidaristic links with trade unions in the country visited. The second aim of the programme was to form a group of 'champions' who on completion of the taught component and possibly the overseas visit would be in a position to negotiate with UK employers on supply chain issues.

The final programme studied that contains an overseas visit, in this case to Cuba, is Napo's *The Next Generation Programme* (TNG). The programme continues to run. The aims of this programme are to develop a future generation of activists, assist activists in developing their skills, undertake a fact finding mission to another country, promote international solidarity, and to have some fun! Seven of the Napo members on the programme undertook the Cuba visit and it is these individuals and their travel experiences that became the primary focus for this research.

## Chapter Five: Understanding Worker Solidarity

In presenting the research data as an indication of how trade union members and workers experience solidarity and arrive at a personal understanding of what it means to them, we need to begin our presentation of findings by illustrating some of the viewpoints articulated by our research participants. This section presents worker voices in relation to understandings of solidarity and places them within expressions of personal agency and notions of hegemony. Within this section some Majority World viewpoints are captured and this offers a wider perspective to that of solely UK worker experiences, a perspective that allows for a modicum of comparison. Understandings of globalisation and globalism are additionally captured here as these sit in close proximity to experiences of world-wide worker solidarity, with some respondents making links to the personal developmental process entered into within union learning. From gaining understandings of what solidarity means to workers we may already be able to glean some insights into experiences of shared interests, identity, and injustice, characteristic of the engagement and activation of individuals.

In addressing our research questions we are assisted firstly by Unite ULR Simon who after completing the WLRI *Certificate of Professional Development in Union Learning* course and subsequently the TUC *Diploma in Contemporary Trade Unionism* course, makes clear relational links between ideas of fairness, equality and workers coming together across the globe to support each other.

“international solidarity means fair treatment for all, if somebody is being treated unfairly your colleagues around the world will come together to support you in that and if you’re not being treated fairly then why the hell aren’t you being treated fairly? It’s always been about building stuff together, making certain that people.....should be equal, be treated equally”.

A sense of activism is intrinsic to Simon's narrative relating to 'coming together' and 'building stuff', with some degree of agency also apparent in his choice of words.

When discussing ideas and experiences of solidarity with other research respondents, findings similar to those of Simon emerge. For Carrie, in the context of post course socialising and recalling an international course that she had facilitated, a "feeling of friendship and warmth amongst the people present" was of importance. Taking her understanding beyond that of feelings Carrie simultaneously placed solidarity within an international development model based upon "empowerment of people, not about the charitable do-gooders sending out help, you know, but about equality". Furthermore, in her experience of facilitating learning events, most of her students could offer course input relating to solidarity as an active engagement process through organisations such as Banana Link or similar civil society agents. Bini seemed to share the notion of valuing strong emotional bonds in relation to solidarity as she expressed how on her internationally oriented course "every single person that I met, they are so fascinating and...so eager, I could feel the eagerness, every single person was like, you know, a family".

For Mark, placing solidarity within his personal history and biography was important as he recalls remembering,

"the time of perestroika, to the time of the Polish trade union movement Solidarnosc, the word then became translated into the word solidarity and the work that they did, and I read and looked at Walensa's life and what he went through, .....and in the Gdansk shipyard people lost their lives in relation to achieving the goals that ultimately they achieved. Solidarity from an international point of view is..... working together and showing the government and employers that we will not be moved and will not just take on board some of the things that are presented to us, and the fact that if the workers of the world were to come together into units, some of the agenda for ourselves we would be much, much stronger".

Not simply accepting the working conditions offered by employers is of importance to Mark as he expresses the need for workers to act collectively on a global scale in order to advance their cause. Mark was one of the few

respondents to express themes relating to the international labour movement. Awareness of others, a sense of identification with them and making supportive connections came to the foreground for another respondent, Neal, as he expresses the belief that,

“solidarity means reaching out to an extent, there’s an aspect of solidarity which means having an awareness. For solidarity to take place and to happen there has to be a degree of awareness and through awareness is a sense of identification, empathy and identification with other peoples’ situations, with other movements, with other people’s struggles, .....what is happening in another town, another city, another area of employment, or in another community, is actually quite similar to what’s happening to us, to me, here, and through that similarity, maybe, it makes sense for us to make a connection, to help each other solve whatever difficulties or face whatever situation that we have, ..... share resources, share ideas and sort of mutually solve whatever difficulty it is”.

Neal’s comments are suggestive of a pro-active aspect inherent within an understanding of solidarity as he speaks of the need to actively and dynamically ‘reach out’ to others, as opposed to passively waiting for solidarity to ‘just happen’. Beyond notions of mutuality and sharing Neal also expresses some sense of logic behind his views about solidarity as an amount of rational sense-making appears within his comments suggestive of collective behaviour. In relation to material solidarity shown to a sister union, Denis was alone in commenting that “I think we got a lot more back than we gave them”, indicating not only the reciprocal nature of solidarity but also its expansive character. He also expresses a belief in its timeless character, as “it’s something much bigger, something that might go on after you’re no longer living...something huge”.

Another respondent, Klaus, continued with international, collective and supportive themes as for him solidarity at its most fundamental level is about supporting workers in struggle generally, whether at home or in another country. Ways in which this is done are of interest to Klaus as he indicates that sending messages of support to trade unions in countries around the world such as Turkey or Peru, is of value, especially when “the vehicle of the

internet makes that very simplistic and that kind of, dare I call it, 'keyboard activism', is much more significant, it does have an effect". Although many research voices make reference to the theme of internet facilitated communication, including through learning, Klaus' comments make the most telling connection with international and global solidaristic activism.

Bala Tampoe, General Secretary of the Ceylon based union CMU, interviewed at a UK based learning event, indicates that with regard to the word solidarity and its contemporary usage, "It's not a word that I use normally, no....it is a word that I have come to know mainly from Europe and amongst English speaking people who belong to the Left". When entering into correspondence on behalf of CMU he prefers to use the word "fraternal, as solidarity is something more than fraternal relationships, it shows some kind of unity with a person in some common endeavour". For Bala the word solidarity is now commonly and widely used in such a manner that its import has become "just a friendly, comradely greeting.....where there is some real solidarity it means also some action". Bala's perspective is suggestive of not only the actual or perceived origin of words but also their potential to enter into global currency.

The solidaristic emphasis for those facing trade union persecution relates perhaps more to simply having a 'voice' on the global stage, with solidarity being seen as fundamental for union cohesion. As articulated by Aidee Moreno of FENSUAGRO, the Colombian agricultural workers' federation, "We ask of our brother and sister unions around the world....that they speak out for our protection. They speak out publicly.....it means that if something happens to a member of our union, FENSUAGRO, they treat it as if it has happened to their own union and they speak out against it". Aidee's words are reminiscent of the traditional labour adage of 'an injury to one is an injury to all'.

For Rohini Hensman, contributing from an Indian labour activist perspective, "solidarity is for workers to feel a sense of..... identification, or sympathy, at an emotional level with workers elsewhere", with the second step being to "to get a some sense of that commonality in what they are fighting for". More

problematic for Rohini are the circumstances that prevail when workers seek to become active. To what extent are circumstances favourable, or not, becomes the key question? Nalini Nayak, of SEWA India, continues this theme and takes experiences of solidarity one step back to highlight some of the prevailing circumstances for women workers. She expresses the view that individual and collective identity formation for women as workers is necessary as a prerequisite to the formation of solidarities;

“Because it’s only when women realise, ‘why is it important to highlight such an identity’?....if you are a worker you have to stand-up and say ‘yes I am a worker.....I have an identity as a worker and it is because of my work that I contribute to the national earnings and therefore the State is responsible for me’. So that’s our first step”.

The motivating and mobilising power of this awareness then becomes evident as, “when women realise that, ‘wow’! they say, ‘come-on, we have to get together’. That’s a huge mobilising thing, and ‘give me my rights as a worker”.

Nalini further highlights the complexities of identity, specifically for women in an Indian context, and the barriers that are faced; “So that’s one of your identities, as a women, your religious identity is also very important.....it is as workers that we are uniting, and then you cut across all those other barriers, identity barriers, especially of caste and especially of religion in our country”. Barriers that perhaps remain largely unseen, especially from Euro-centric perspectives, yet practical barriers that can be overcome in Nalini’s experience when the identity of ‘worker’ is privileged over all others.

Sitting immediately adjacent to experiences of global solidarity, and perhaps integral to workers’ notions and understandings of the phenomena, the research findings locate an emergent theme relating to workers’ personal experiences of globalism. This requires attention within this section and can perhaps be encompassed through Jane’s perspective that “the world, it’s got smaller for me I think since the course”. She locates her colleagues’ everyday focus as being primarily within their working lives as “you’re just looking at that workspace and maybe a little bit wider, maybe round the county or something, but you’re not really thinking too much about what’s happening outside of

that”. Here Jane certainly raises a pressing concern, that of enabling union members to understand and express solidarity on the larger scale, outside of the immediate and local. Her choice of words certainly echo Harvey’s (1990) notion of the compression of space and time.

Jane directly ascribes her growing personal sense of globalism to her learning because for her “as the course unfolded it was kind of like the scales were gradually falling from my eyes, .....and you started to see this kind of web of how things connected really around the world.....I certainly remember that quite vividly and it just made me think about things in a wider context”. The process involved in learning is touched upon by Jane, and others in relation to their global outlooks, as it was necessary to engage in “putting it into place in my mind over the weeks following....I did benefit from it and over the years, that’s become clearer and clearer”. Jane’s educational experience and associated developing clarity, allied to her interest in textile and clothing manufacturing and supply chains led her to speak of the less prevalent theme of trade and globalisation. As she puts it, “you can’t ignore the G-word, globalisation, when it comes to trade because it’s changed things so much in the way that some of these companies work”.

For Jane the world has changed massively with a direct impact not only on workers but also upon their localities and communities. Simon also acknowledges that it was only when he started becoming involved in the trade union movement that he realised the impact global issues had upon him, including “everything from politics to industrial relations, through to just people’s everyday groceries”. The connections made within narratives that link the global to the local is significant here as Jane’s and Simon’s accounts speak of an interrelation, a ‘connectedness’, and interdependence between workers, peoples and nations on a global scale.

With Mark, in a similar vein, speaking from the position of a full-time employed learning facilitator, one of the key messages that remains important to communicate is that of workers and workers in learning to understand the wider trade union picture before that of focusing solely upon the immediate

workplace context, echoing Jane's views above. This for Mark is important as when the wider perspective is presented to workers "it helps them in a sense to be able to re-evaluate their situation, so to try and think about other people and other situations before they deal with their own, because often.....it helps tease out their own sort of lines of negotiation". A sense of union learners needing time and space to think, evaluate, and reconfigure, appears important within Mark's comments, including the need to reflect upon the position of others and an understanding of the collective nature of union activity.

Ethical and moral stances relating to a sense of justice were apparent throughout the research findings, articulated cogently here by Simon with respect to what he sees as the operational ambiguity of trans-national corporations (TNCs) practices.

"one particular level of their behaviour in the UK and an absolutely totally different one to the US, which they see as perfectly viable, because 'hey, it's a buyers market and we're buying people at this moment in time'.....but they act very local when it comes to 'what can we get away with' in local legislation. It's global when it suits them, it isn't when it isn't. Strangely enough, as ever, it's always the worker who suffers on that end, it's never to their benefit from what I can see".

For UK research respondents it appears that within experiences of solidarity ideas of shared identity as workers, equality, fairness, reciprocity and collectivism prevail. These are cemented by the formation of strong fraternal, sympathetic and empathetic emotional links, maintained in part through internet correspondence, and founded upon an ethical and moral value base of justice for all.

Thematic articulations of personal understandings of solidarity can thus be placed into the three categories of affective responses, written communication that is increasingly digital in nature, and finally that of active, praxis oriented engagement. These three aspects reflect the affective understandings highlighted by Wilde (2012), the active elements of Mohanty (20013), alongside the creative and dynamic aspects of Featherstone (2012). When adopting a wider perspective on issues of solidarity and its manifestations, it

appears that the development through learning of an awareness of globalisation and the perceived injustices practiced by some global commercial actors plays a pivotal role. When personal reflection is added to this equation then self-evaluation leading to making sense of one's own position becomes apparent. This leads to the attribution of responsibility and culpability towards any organisations seen to be perpetrating injustices against workers at a global level, as instructive suggestions of personal agency and understandings of hegemonic influences begin to emerge.

From the limited data gathered here it is suggested that the influences outlined above seem to resonate with the experiences, understandings and expression of solidarity held by some workers within the Majority World as they express their views at various UK based labour events. Having gained some telling insight into how workers experience, construct for themselves and come to an understanding of the meaning of solidarity, the question of how UK union formal learning programmes foster this process is to be addressed next.

## Chapter Six: Formal Learning for Solidarity

We have offered some contextual perspective to the current position regarding formal trade union courses and began to address the research questions relating to why and how unions provide solidarity learning to members. This sits adjacent to research respondents' experiences and understandings of solidarities. As such we can now continue by positioning our respondents' narratives within the formal learning context and examine learner experiences in greater depth. In continuing with a thematic approach we draw upon the central aspects of our theoretical framework to aid analysis. The research findings begin to offer more pronounced form to how effective learning for solidarity is in generating activism, with sub-themes emerging from the data. Findings relating to the pedagogical approach adopted within union learning also resurface, as do Majority World perspectives within certain formal settings. It is to be remembered that the author has completed the on-line TUC *Going Global* Course, the WLRI *Certificate of Professional Development in Union Learning* course and the GFTU *International Development Champions* course, whilst also attending the GLI *International Summer School*. Reflections on the author's experiences and any significant impressions will be offered where thematically relevant.

It was the following contribution of Simon to this research that not only reflected the experiences and views of many other formal course participants, but also encapsulated some of the most salient themes that emerged through participant narrative relating to more formal trade union learning. Simon successfully completed the WLRI *Continuous Professional Development in Union Learning* course, followed shortly afterwards by the on-line TUC *Diploma in Contemporary Trade Unionism*.

"It would have to be the historical module to be honest, yes it was definitely that, finding out the history of how trade union education took shape.....It was all about educating workers and helping other people understand their rights, that's education, that's learning. Where do you go without having that curiosity to learn as well as to protect, you learn to protect yourself at work, from my perspective that's what I got from

the course, it was really eye opening.....Everyone should have the right to be able to develop themselves, that right to be able to do it themselves. They might need a little nudge to use it, but yes, I believe strongly in that”.

In a research project designed to examine and inform contemporary and future global issues within worker education and learning, Simon’s fascination with historical concerns may not at first appear to be an auspicious starting point. It is a theme within the findings however that is to reoccur within interviews with other participants and it perhaps reflects a grounding in history that workers’ movements need, especially unions. The need to feel part of a proud tradition and to be the current custodians of that tradition is a powerful influence upon individuals, including those undertaking learning programmes or even participating in informal learning, a prerequisite perhaps to initial feelings of solidarity. What is not immediately apparent from Simon’s comments is any sense of globalism, of thinking and acting on a global scale.

So with suggestions and themes of worker education, learning, solidarity, rights, fairness and “nudging” presenting themselves for Simon, in what ways does more formal union learning make connections with global issue? This question includes possible concerns for everyday workers through developing any sense of transnational solidarities. Within this section, exploration, examination and analysis will be offered in relation to the central tenets of mobilisation theory, those of grievance, shared interests and identity, leading to a sense of injustice and how this correlates with the research data from individual interviews. Simultaneously, where do the essential characteristics of mobilisation theory connect with worker experiences being addressed through learning and to what extent does formal union and labour learning programme subject matter critically foster transformative discourse and reflection upon experiences of injustice?

### **6.1. Formal Learning and Transformation: some activating factors.**

The intrinsic value of learning and the opportunity for people to develop themselves in whatever way they choose is apparent within Simon’s

comments and he positions this as a human right, all premised on a natural curiosity to learn. In a wider sense Simon additionally aligns the right to education and learning with the need for workers to protect themselves, especially in employment settings. Indeed this learning journey has taken him from being “frustrated at work, it didn’t seem to be going anywhere”, to joining a large union, becoming a ULR and initiating his activist-learning journey.

For Simon the struggles surrounding learning, allied to his sense of agency, present themselves when he acknowledges that “it wasn’t ‘till I became a Rep that I took part in learning that I wanted to do rather than learning-education that the business wanted me to do. So it was really only from my trade union that I started doing education that I wanted to do”. Simon’s sense of agency also surfaces through his motivation to pursue his personal vision of learning and self-determination, as opposed to that of his employers. His underlying beliefs are expressed and summarised in the word “fairness”, a word akin to notions of justice, equity, and equality. Simon also believes in workers needing a “little nudge” to get them active and put their learning into practice, an awareness possibly gained from his ULR experience.

If Simon’s narrative speaks of the right to learning and personal development as an activating influence within his transformative journey, then perhaps Liza’s narrative leads us a step further into an understanding of what drives individuals. For Liza notions of justice within a more global context surface as motivating factors. As a member of a large teaching union, the NUT, Liza undertook the *International Development: It’s union work* course, with its course subject matter relating to the place of unions within international development, poverty reduction, and global teacher solidarity.

“I think that basically we are one world, we all live together, it’s an ever shrinking world and people travel and have much more connections with countries than we ever had before, it’s to develop all those things, you know, of tolerance, respect for other nationalities, cultures, and appreciating similarities as well as differences, and all those things like a sense of justice, personal responsibility for what goes on in the world, realising that actually we can make a difference”.

If, with Kelly (1998), we take a sense of individual grievance developing into a sense of collective injustice as our *sine qua non* for activating and bringing together workers to pursue their aims and aspiration in a collective manner, then Liza's narrative offers us a further thematic starting point for our entry into some of the fundamental prerequisites to be found at the interface between worker formal learning and global awareness. Liza reminds us of Harvey's (1990) space-time compression and the consequent need for greater understanding, tolerance, respect, responsibility taking at an individual level, and finally, the requirement of justice. She indicates a strong sense of agency through her belief that as an individual, acting with others, change can be made. She also emphasises the need for cultural awareness and sensitivity.

Grievance, injustice and any resulting sense of anger serving as a motivating factor in driving individuals to act, can of course take many forms. For Mark it is through a deeply held antipathy towards any form of bullying or exploitation:

“one of the things that agitates me in life is that people bully or take advantage, I hate that. It's just who I am as a person....I just hate the thought of people being exploited really.....and that again, if you think about it on a globalised basis, if it's bad in this country it's going to be ten times worse in other countries.....We need, I think, an international union agenda to put more effort into this”.

Several of the research participants speak of 'double standards' and 'hypocrisy' as their primary sources of grievance and injustice, especially in relation to large UK based companies or transnational corporations who are perceived as subjecting employees to differing employment standards across several countries depending on their spatial positioning.

Perhaps unsurprisingly, for those in teaching, expressions of injustice through respondents witnessing poverty and the plight of 'underprivileged children' around the globe arose, with solutions and active approaches to resolutions of this injustice being offered, in particular by public sector teacher Bini, via “sharing the resources and sharing the ideas” more equitably. Similarly, for public sector teacher Liza, highlighting parents' and childrens' rights was

called to mind during interview discussions, to “enable people to have a voice.....campaigning for children in Palestine.....children who were basically being taken hostage or even shot at for trying to get to school”. For Liza, the “empowerment” of those facing injustice is her chosen solution for implementing any viable process for overcoming unequal power relations. Injustices perpetrated against minority groups within global society surface occasionally in the research findings, primarily in terms of gay rights and/or disability rights. Women’s empowerment is apparent in relation to delivering worker education as Carrie highlighted oppression in the question of “why is it that women have suffered so enormously under globalisation”?

Whilst for most interviewees the notion of injustice was a key driver for active change and demonstrations of worker solidarities, for Susan it is clearly explicit during discussion as she recognises that “in many ways that’s the thing that brought me on to becoming a Rep in the very first place, and I think it certainly motivates me”. In the context of her ULR role in which she utilises innovative strategies for engaging public sector colleagues, Susan noted that, “the thing that triggers people more than anything else, is that injustice, ....when they suddenly realise how fortunate they are themselves or how someone else is being abused in some way, their working conditions, or the fact that we take for granted clean water, and that’s not the same for everybody”.

Notions of injustice also arise from historical experiences as the older research participants include narratives from past decades, as illustrated by Mark for whom “the 80’s, growing up in Liverpool...(where)....Thatcher’s educational reforms had a devastating impact”. This experience and senses of injustice is thus carried into the contemporary learning environment and partially informs participants’ views prior to undertaking more recent study. For those employed in the public sector the focus is often upon the impact on social services resulting from government privatisation policies. So, across employment sectors such as transportation, education, and the public sector, as well as across some of their representative unions, in this case the RMT,

NUT, and PCS, a clear sense of wanting to fight injustice is apparent throughout narratives, with respondents providing strong examples.

Next we come to themes of identity awareness, formation and positioning as another essential element within mobilisation theory. Kelly is referring to social identity as opposed to individual identity (character or personality) and defines this as being comprised of “social categories to which we belong and the positive or negative evaluations of those categories” (1998:30). This concept is closely associated with meaning-making and the structuring of life-wide experiences, which is a necessary psychological undertaking by individuals. It inevitably leads to people making comparisons with other groups and generally seeing their own as generally preferable. Notions of stereotyping and social attribution come into play as a consequence, that is the collective blaming or holding another responsible. Additionally, Kelly reminds us of the idea that all individuals can engage and utilise both their individual identity *and* collective identity at any given point, as they so choose. This makes “individualism and collectivism situationally specific” (1998:31) with any possible boundary definition between them becoming of secondary interest to the question of *why* they choose to privilege one social category over another at any given point.

Moore’s (2011) findings not only raise pertinent questions in relation to the identities adopted by trade union members in the 21<sup>st</sup> century, but also prefigure the findings in this study in that contemporary worker identities can be difficult to locate. “The narratives of activists confirm that the subjective dimensions of union activism can be elusive...(with)...the absence of conscious social or political identifications...(alongside)...a sense of denial or downplaying of their activism” (Moore, 2011:18/19). Whilst clearly identifying and positioning themselves within their respective unions and the worldwide union movement and speaking in the context of transnational solidarity, several younger Reps who were interviewed distanced themselves from historical and perhaps stereotypical perceptions of trade unionism. One respondent stated, “don’t shoot me down, I’m not a red flag waver by any chance...”, which suggests some reluctant association with traditional labour

internationalism and red flags, emblems of socialist militancy. Similarly, other younger respondents said that, for example,

“I have a Rep role for admin officers,.....but I wouldn't say I'm a die-hard (union) member because we do have people, you know, who's world will revolve around (name of union) as they do lots of things, I wouldn't say that that was me, no. I'm part of the union but I guess I'm part of the union for my own interests rather than because of the union, you know, I want to be safe and know that I have job security so that's why I'm in a union” (Rad).

Both these narratives may be indicative of Moore's identified lack of political acknowledgement even amongst union Reps, allied perhaps to Lave and Wenger's (1991) notions of legitimate peripheral participation as all members enter a journey into their chosen positions within union structures. The latter voice may also chime with Moore's findings around the downplaying of roles, especially by women activists.

Shared interests form the next essential strand within mobilisation theory, seeking to explain what if anything brings workers together through collective interests. For Kelly, “the fulcrum of the modal is interests and the ways in which people (particularly members of particular groups) come to define themselves. To what extent do they believe their interests to be similar to, different from, or opposed to, those of the ruling group? Do they define their interests in individual, semi-collective or collective terms...?”(1998:25). All respondents, perhaps unsurprisingly, locate their initial and primary interests within their world of work. The sectors in which individual respondents are employed present as the initial channels for shared interests. This, again somewhat unsurprisingly, is reflected in the course content of the formal learning programmes under study as trade unions with a more immediate relation to global matters can foster global solidaristic links more readily. For example, for Liza and Bini as teachers, when language barriers are put aside, identifying with other schools and teachers worldwide appears obvious and natural as a potential developmental experience for pupils and staff.

All respondents locate their interests in their respective trade unions and this is defined in terms of either sectoral unions, the UK union movement, or the international union movement. Expressing where and to what extent global interests are of importance to individuals also occurs outside of the international union movement, primarily through justice-poverty related NGO's and/or environment related organisations. Within trade unionism, collective interests are expressed via specific Reps roles, primarily but not exclusively, that of the ULR role. The majority of those interviewed are public sector workers and thus their strong interest in public service provision in the UK is evident and in contrast to current privatisation policies being implemented by the UK government. In addition to collective anti-privatisation interests, current UK government and US government policies are in opposition to the respondents' views on imperialism and its advancement through war. Whilst all those interviewed use collective terms within their narratives when placing their interests within the context of labour advancement, some indicate both the individual self-serving nature of union membership as allied to the collective aspects (Simon, Rad). When expressing their sense of shared interest at either a local, national or global level, some respondents position themselves with women's issues or the feminist movement (Linda, Carrie), whilst others demonstrated a propensity to locate themselves alongside those experiencing social deprivation or poverty (Bini).

In considering attribution as one of the key characteristics of mobilisation theory we must examine its prevalence within research respondents' narratives in order to gauge any degree of influence resulting from formal learning. If we adopt an understanding of attribution as "an explanation for an event or action in terms of reasons, causes, or both" (Kelly, 1998:30) then for the majority of the research contributors responsibility, blame and culpability are framed in relation to UK government privatisation policy and practice, powerful countries, primarily the USA, and/or large multi-national companies. Perhaps in relation to all of these, Carrie, through her tutoring work and experience, captures a key issue as "most people linked it directly to their own experiences in the workplace, so they saw the outsourcing going on in Local

Authorities or the privatisation of transport or cuts in welfare, so they took all that as being linked to globalisation, as a fault of that”.

Other public and private sector respondents perceive the UK government’s private sector mentality, with contracting-out being based solely on reduced costs as being worthy of the focus and attribution of blame. Allied to this issue was any resultant reduction in employment conditions. For Klaus this entails an element of incredulity as “you’ve got a firm whose background is in shipbuilding moving into education!” For Denis the growth of the ‘shadow state’ presents questions as with “privatisation and outsourcing ....you actually create what’s been termed a shadow state, a state but not quite the state, another layer there between the public and the government”, with implications for loss of direct government control and accountability to the taxpayer, as “it’s the culture and corporate nature of those companies (Serco) that’s problematic” for workers.

In terms of the influence of powerful countries other than the UK, it is America that comes to the attention of many of the interviewees, especially those who had visited Cuba, again as this relates directly and immediately to their personal experiences. “Fighting the inhumane blockade imposed by America, but also in fighting for the release of the Miami Five and that’s a very powerful moment hearing about the mothers of the Miami Five”, captures Tracy’s feelings on an unjust approach by America towards the Cuban peoples. These comments are additionally redolent of framing processes (Benson and Snow, 2000) that occur within the political and ideological discourses that prevail around such issues, as differing parties attempt to claim any political or ethical high ground in the consciousness of others.

Multi-national companies are attributed responsibility for much of the perceived injustice faced by workers, with “Siemens....they’re busy conducting a union busting campaign...” being referenced by Simon in relation to the hypocrisy that he feels they demonstrate through their treatment of staff around the globe. Carrie takes this further in her analysis of “the powers of those who control the means of production, the power and how

that's been internationalised, how it's global now, they are so powerful now these people, we can't possibly in any way underestimate their power". In a Gramscian (1971) sense she expands upon this as she explains, "not just physically but ideologically, and the way our minds are controlled and the way our cultures are damaged. People's minds are warped with their inhumanity and the way they think...(and)...the importance of being conscious of that." It is of note in relation to language usage that with the exception of Carrie, a more experienced trade unionist, the phrase neo-liberal was not employed by any other interviewees studying up to Diploma level.

Finally it is of note that for Mark and Linda, in the context of discussing both multi-national organisations and neo-liberal minded governments, the media is identified as being responsible for mediating unjust policies enacted by governments. "The British media covers what goes on in Britain, it's dominated by what government dictate it to do", whilst for Linda, Cuba attracts constant "bad press in America" for its political stance. Comments here indicate that the framing power (Benson and Snow, 2000) of the international media does not therefore go entirely unnoticed. In Denis' case, having completed the GFTU *International Solidarity* course,

"there was some discussion of newspapers and incidents of how they report trade union disputes.....we looked in particular at how Bob Crow as a strong trade unionist had been described in the press, and other prominent trade union leaders, how they had actually been described. We realised that wasn't actually just something that happens in this country but something that happens around the world to trade unionists...(as)...people get a distorted view of the world if they only listen to, for instance, Fox News".

Leadership is an aspect of mobilisation theory that for Kelly involves at a grassroots level the motivating and organising of workers through such simple tasks as informally yet regularly talking to colleagues and discussing issues of importance to them in the workplace. Within this role leaders practice the framing of issues and building a collective response through defining work related difficulties around notions of grievance and justice. Traits of determination and the willingness to jeopardise their own position are evident

from leaders in their efforts “to transform vague feelings of discontent into a firmer sense of injustice” (Kelly, 1998:33). We are also reminded by Kelly of the power of language in the context of characterising issues, as leaders can be generally found “deliberately using language as a power resources to ‘frame’ a particular definition of interest” (1998:29). Examples would be the use of certain words, with associated connotations, to frame issues in terms of workers’ legitimacy or employer illegitimacy within an issue, a collective over an individual approach to dealing with issues, a national as opposed to a local way of thinking, and/or a class definition of worker interests and struggles.

In terms of leadership several participants held trade union Reps positions when entering formal study. These were ULRs in the main. Some of the respondents had progressed from their initial point of study, and through subsequent study and advancement at work, into full-time paid positions within their respective unions. Mark and Simon for example both hold full-time learning organiser and organising posts respectively. One of the research respondents, Klaus, already held a full-time paid union role when beginning his course and was thus engaging with the course from a more experienced and knowledgeable position. These three individuals, as evidenced through their narratives, certainly brought a more nuanced political awareness and understanding to their respective courses.

Before closing this section we must briefly touch upon the issue of trade union members arriving at an awareness and improved understanding of transnational issues through courses with differing content. This is a question not so much of what may drive them to learn and engage in solidaristic activity, but what alternative opportunistic doors they can pass through to access formal learning for solidarity. The extent to which unions embed transnational content within all their courses is of interest. In Denis’ case this occurred as he became more aware of transnational issues when he undertook a health and safety courses for his union, via the TUC. As part of the course he explored transnational organising and issues involving a European perspective. As he says,

“then I became a lot more interested.....It actually started as part of the curriculum ....in the Diploma in Occupational Health that you can do through the TUC, Unionlearn, there’s actually a section in there really focussing on ‘what is your trade union doing to link internationally’, and it did start mentioning some of the international organisations. The International Labour Organisation, other international bodies, and one of the exercises, homework, was to investigate what organisations your union was into”.

The extent to which trade union learning can enmesh global matters within other courses, whilst also offering interested individuals an accessible portal into the interconnectedness of global union concerns is of thematic note. Although not thematically strong within research respondents’ narratives, Denis and Simon indicated their further learning occurred along this pathway, primarily via TUC courses. The extent to which smaller union bodies or trade unions incorporate transnational content into their learning programmes is difficult to evaluate from this thesis research, albeit remaining a key question for union learning and organising.

Finally in this section, as we examine further in the overseas Study Visits chapter below, issues of explicit political awareness, knowledge creation and engagement can be difficult to detect within early stages of an individual’s learning journey into activism. This topic clearly intersects with the framing of issues by all involved political actors, including trade unions. Some of those having undertaken study visits were perhaps thrust more directly and with a heightened sense of immediacy into everyday political arenas and this may have held some motivating effect upon return to the UK. Themes of explicit political engagement through learning have also been limited within formal UK awareness level courses, the GFTU *International Solidarity* and the GLI *International Summer School* perhaps being exceptions to this thematic thread. Having completed both these courses, Denis was in a position to declare that with reference to the former course,

“There should have been a health warning on it actually, on their advertisement, ‘Some political discussion may take place!’ which is almost like an apology. I did notice that, I thought ‘gosh, this is so unusual these days, for things to be political, that they even may have to put a warning on there’..... dare I say some Marxism was even

mentioned...and some of the language, the Socialist language was actually used,.....but it wasn't like "this is the way you should think".

Within the GLI *International Summer School* the author was able to relate directly to Denis' comments as a possible distinction, if somewhat artificial, could be drawn between participants expressing a culture of what may be termed 'socialist' thinking and language and others who appear unaware or unwilling to adopt this ideological discourse. Any overlapping discourse amongst participants could perhaps be seen to come more from a contemporary alter-globalisation movement perspective (Hosseini, 2010) and it is this noticeable difference in approach that is of thematic interest.

Again, an aspect of age may come into the learning equation at this point as Denis as an experienced learner and activist notes that some of the older participants on the course were very comfortable with discussion formats, "with the cut and thrust of political debate, whereas some of the younger people who were there, actually it was a kind of new thing for them, or a kind of revelation". Denis concludes with his view that some younger learners "really enjoyed it and I can imagine some of them going back to their offices and trying to engage people in discussions about international trade unionism and that being a new experience for them". For Denis and his fellow learners, of whatever age, taking issues back to their offices closes the circle between informal and formal learning. Closing the formal-informal workplace circle could however be becoming increasingly difficult for trade unionists due to contemporary employment practices, notably within offices in the example below.

"what's missing a lot in work places is discussion. Going back to earlier times...there was a lunch-room and people had a lunch break, instead of sitting in front of a computer eating lunch they would go to a staff room, have a cup of tea, sit down and discuss what was going on, ....impacting on our work,..... I think that the fact that our offices are now open plan, those discussions don't take place in an open plan office, workers don't feel comfortable, they feel compelled to get things done and they sit facing a computer screen all day.... Staff rooms and things have been taken away....there has been an erosion of facilities and those facilities did have other benefits like stimulating

conversations and discussions between workers, certainly trade unionists could access more workers through that” (Denis).

Taking formal learning issues back into the workplace appear here to be compromised by intensified employment practices, reliance on computerised technology and the diminution of places and spaces for workers to organise within. As identified earlier, learning through a ‘bite-sized’ methodological approach does occur in an effort to facilitate trade union member development under increasing workload pressures. Arguably social media is replacing direct human interaction as Mike, studying at Masters level on the Ruskin College *International Labour and Trade Union Studies* course reminds us; “we live in a networked society...and technology intersects with political and social events now”. What then becomes most salient for Mike is the question of what human processes and mechanisms are at work within the widespread use of social media.

Of all the formal courses and learning events under study here the GLI *International Study School* is somewhat exceptional in that approximately half of its invited participants were from outside of the UK. As such, certain issues emerge that can be seen as challenging to UK trade union solidarities learning. Whilst these issues may occur within other learning spaces such as conferences, at a formal transnational learning event they may present as more acute and are therefore in need of greater illumination here.

In an Asia context, Sanjiv Pandita of AMRC expresses the view that all Asian trade union history has to be seen within Nationalist struggles for independence as that is an essential element in their antecedents. As he explains, “It is also our history that most of the trade unions have been fighting colonialism, historically,.....so they had to be Nationalists at that point in time and history, but as we have experienced the world has changed”. The theme of colonialism and neo-imperialism is of interest when contrasted with documentary data here that demonstrates that within the content of all the courses studied here only one makes explicit reference to UK learners examining modern day imperialism. Individual and collective histories it would

appear play just as crucial a role within Majority World experiences as they can do in UK worker experience, as seen earlier in our findings.

Placing similar thoughts within an educational context and perhaps more of a contemporary setting, Rohini Hensman articulates the view that,

“part of any education programme would be for workers to try and understand both their history in terms of imperialism, what it has meant for third world countries, that they were not always poor and underdeveloped so to speak, that this has been the result of imperialism and various policies that have tended to rob them of their resources, slavery robbed them .....I think the problem tends to be that imperialism is seen as the framework, the overall framework,.... it still persists, in the form of military interventions in third world countries, yes, and other sort of less obvious ways”,

The ‘less obvious ways’ that Rohini alludes to suggests the dominance of neo-liberal globalisation that promotes the power of free-flowing capital across the world (Hensman, 2011). Again, for Sanjiv Pandita, there is a need for trade union solidarity to build beyond national boundaries as capital does not acknowledge State boundaries, as “the mobility of capital is unprecedented, more than any time in history....How then do we re-define internationalism meaningfully in terms of organising a critical mass against this free flowing capital that is ruining the lives of people everywhere?”

Themes relating to the shared understanding of what solidarity is emerge at the GLI *International Summer School* as it was seen as involving positions “in which we see ourselves as equals. Sometimes I believe that intellectually we are not looking at each other in equal terms,.....So we have to overcome these difficulties to really be in a situation where we are all equal internationalists, all working together” (Khalid). Continuing with narrative themes that involve practical applications of solidarities Sanjiv Pandita asks how workers and their organisations can build equitable relationships, particularly when existing patronising attitudes and practices continue to prevail. In travelling extensively in South Asia and South-East Asia Sanjiv continues to experience that “many times the relationship between North and South is like charity, ‘we’re here to help you’ basically. This won’t work. It has

to change completely. It is solidarity..... but to fight together then it has to be an equitable relation....The discourse has to change, it has to go upside-down, only then can we build an equitable, international movement". The 'upside-down' of Sanjiv's narrative is suggestive of the hegemonic power of UK trade unions needing to be more fully addressed before any global relational dynamics can become more balanced.

## **6.2. Formal Learning and Transformation: some key phases**

With regard to formal courses and any transformative developmental journey entered into, or completed, by our research respondents, we can begin to understand their experiences by utilising Mezirow's (2000) key phases of personal transition. Experiences of a disorientating nature are suggested by several of the interviewees, albeit in differing forms. Allied to feelings of injustice many allude to the disturbing effects of seeing, either in person or through media channels, the perturbing results of poverty, provoking self examination in both an ethical and emotional sense. Poverty and its effects upon the research participants appear as one of the primary sub-themes within individual narratives. This may perhaps be expected from individuals who hold deep seated notions of injustice, fairness and equity. Carrie, for example, tutoring on the TUC *Globalisation, Gender and Poverty Reduction* course emphasises how having guest speakers attending sessions and relating issues to global poverty has an immediate and "powerful" impact upon her students. The key for Susan as a ULR was to take the "shocking" aspects of poverty and make personal links to families and parents in the UK, to be later supplemented by information on how individuals could become actively involved in given campaigns.

Similarly, the disorientation elicited by witnessing violence also comes to the fore, especially for those who have experienced it first hand through union solidarity visits to other countries or some form of overseas travel. As James previously remarked, first hand experience is "challenging" and "life changing". Linda also makes reference to the "inspirational" impact upon

“what people are willing to do to make things better”, as she reflected upon the obstacles faced by trade unionists in other countries. The issues of poverty and violence, especially against trade unionists or workers in general certainly make a significant impact upon those exposed to its consequences in such countries as Colombia.

For others the dilemma of their careers having little or no direction proved disorientating as, for example, Simon’s remark that his work “just wasn’t going anywhere” typifies the motivational factors expressed by some, factors that act as catalysts for their respective transformative learning journeys. Other aspects of disorientation leading to change within individuals involved the rapidity of change within a globalised, “shrinking world” (Liza) and the support offered by trade unions in time of personal difficulty. For Klaus learning itself that involves examining issues around the process of globalisation add to experiences of self examination and begin to open the door to critical assessment of personal assumptions. He feels that “it challenged some of my own ideas...so that was good I think, it’s always quite healthy when people come out with things that are different or even in some cases opposing to what you think”, indicating the intrinsic value of challenge within critical education.

Indications of the progression through a collective experience that according to Mezirow constitute an early phase of transformative journeys are outlined by Carrie who from a tutor’s perspective found “it was really good having that shared experience, because people learn from each other”. Similarly for Bini the sharing of the learning journey is experienced through regular trade union conference attendance as she “learnt a lot from all these conferences....i went to maybe three, yes, three conferences.” A collaborative approach also works for Mark as he finds that “working with other people gives you this genuine interest”.

Exploring options for future personal transformation through learning, allied to planning a course of action and trying out new roles is clearly evidenced within several respondent narratives, especially those holding a ULR role. But

also for non-Reps such as Bini future aspirations involve wanting “to apply for a course in Ghana. I want to study first, but in the meantime I want to do things thoroughly and once I get the knowledge and more experience I should be able to support more and contribute”. For Liza also creative activity manifests itself through “particularly getting involved in campaigns”. In linking personal developmental planning to union Branch organising, Carrie’s experience of facilitating training events indicates how “you can actually make meetings lively.....and suddenly tap into people who don’t necessarily want to come and hear about strikes...they don’t relate to that, but they do care about someone on the other side of the world”.

As indicated earlier all of the ULRs interviewed position themselves either in learning, planning future learning events, or expanding their horizons through undertaking new job roles, albeit at times on limited work contracts. Mark typifies the ULR journey by indicating that “at the end of the project I do have an ambition to go back into the world and finish off some of the potential opportunities and work overseas....I have a personal ambition to achieve that”. Increases in self confidence are evidenced by those who progressed in a professional capacity or via trade union Branch involvement, although it is of significance that embedded within the women’s narratives are expressions of the difficulty of confidence building. Jane notes how going on one of her first courses “I was a bit nervous about going on my own..... certainly with women, they don’t like going to courses on their own, they like to go in pairs or something.” For Carrie women only courses are necessary as they play a crucial role in female emancipation, in which

“there is something to be said for women having the space to analyse why women are in such a weak position, and to do that in a way which is very personal. I do think it’s not about excluding men, it is though about giving women the space to be very uninhibited.....I think that when women are on their own they’re different to as they are when they’re with men.....Sometimes we need to criticise ourselves and what it is about ourselves and what we do that contributes perhaps to our own oppression, and it’s very difficult to do that in a mixed audience.....and it’s also about sharing those very personal things, you know, ‘personal is political’ really,”

Much of the improved confidence levels identified by Mezirow as an essential aspect of transformative change perhaps unsurprisingly originate from an increase in knowledge and/or skills acquisition, with this research evidence indicating that this is particularly so for women learners.

Glimpses of all aspects of Mezirow's transitional phases can thus be unearthed within narrative responses. On occasions they occur as a direct result of the critical methodology used within trade union and labour learning programmes or alternatively alongside indistinguishable lifewide experiences. Those participants that find themselves further along their transformative learning journeys exhibit a greater articulation of Mezirow's essential phases, albeit in no specific order, and present as more firmly embedded in political, ideological and personal positions.

### **6.3. Formal Learning and Trade Union Reps: the ULR experience**

Whilst expending much of their energies on attempting to activate others through the opportunities offered by learning, it is of interest that three of the four ULRs interviewed found their own development through learning, including awareness of globalism, leading directly to professional advancement within their respective unions. In terms of their learning journeys, although still continuing, these individuals could be seen to have progressed through a period of personal transformation suggestive of Mezirow's (2000) proposed phases of development. Examples of unsettling experiences that perhaps contributed to individuals wanting to learn or engage in their union were wide ranging.

For Simon, "It was only really when I got some help from the union in a work based situation that I was experiencing,... in disciplinary issues, .... I said 'absolutely, that's what I want to do'".

For others the impact of learning about disadvantaged and impoverished groups around the world can trigger reflection that leads into a learning journey, as "people are actually shocked when you start giving them facts and

figures” (Susan). Jane articulates the importance of knowledge acquisition and growth in confidence for ULRs as when she took her first steps on her transformative journey she was “fairly green I think really at the time, I didn’t have a vast amount of knowledge of that sort of thing”. However, as with the narratives of those not in Repts posts “it’s massively built my confidence over the years”, and whilst “I wasn’t massively active at that point..... after the International Development course, eventually, I think about six months later, .....then I became much more active”.

For Mark and other ULRs learning about transnational or global issues has broadened their horizons as “it’s narrow minded and short sighted to think that nothing goes on outside of your own little world .....and I suppose in a sense the globalisation module pulled a lot of that together for me”. A greater sense of direction in life and career path is expressed by ULRs as planned courses of action and the exploration of options are indicated, again through personal agency. For example Mark describes his “ambition to go back out into the world and finish off some of the potential opportunities and work overseas”, whilst for Simon “my learning and the opportunity the union’s given me has helped each step of the way, has directed my career into a new path”.

As individuals involved in supporting colleagues along pathways of learning and personal development, ULRs are uniquely placed to observe the transitional progress of others. For example, as Susan recounts of one of her colleagues at work and in her union Branch, “she did that course, and she has a completely different perspective on everything she does now, both within the union and outside”, reminding us with particular reference to the scope of this thesis that “she very much looks at the bigger picture and I think that’s probably key to international issues and globalisation, it’s making people look at the bigger picture as there’s more to it than what’s just in front of them”.

Jane expresses similar views as from a union organisational perspective she takes account of the fact that “we got two new activists out of that (course), more confident, and they wanted to become more involved as well and then

one of them came back and gradually over the years, she's still in the Branch, but has sort of moved up through the organisation as well and she credits that course with having built her confidence and it's given her techniques". Notions of exploring and planning new roles in a union or its Branch emerge within accounts from ULRs. As they tend to have some awareness and oversight of member development, ULRs can observe growing self-confidence or competence from knowledge acquisition, alongside for example reintegration of life perspectives, these all being key aspects of transitional journeys of discovery.

As we have identified, empirical research materials relating to the efficacy of UK trade union learning are limited in extent, being even more so in relation to the impact that learning has on active-solidarity construction. Nevertheless, one glimpse of the myriad of courses that individual learning pathways can take is found in Ross et al's (2011) examination of trade union members' learning journeys, as expressed in their own narrative accounts. Echoing some of the themes being unearthed within this thesis, Ross et al's research encompassed the experience of some forty-two adult learners who at some point had engaged in trade union learning programmes. Focussing on learning within a union context, the motivations of learners, learning spaces, barriers to learning, and the respective transformative learning journeys of those interviewed are insightful.

Over one-quarter of those interviewed by Ross et al were ULRs. They were seen within this body of research material to be assistive in removing barriers to learning, whether it be formal or informal learning, with some of the more personal barriers being such issues as lack of confidence within prospective trade union learners or lack of trust within potential learners. More structural barriers being addressed by ULRs were those of limited funding for learning, allocated work time for learning and managerial obstacles to educational engagement. ULRs were perceived amongst respondents to develop trust and confidence within workers who may be fearful and reluctant to engage in learning, due in large part to poor previous educational experiences, hidden disabilities, negative family influences, or varieties of discrimination at work.

In terms of finding suitable spaces in which to learn, ULRs were seen as generally encouraging, and in some cases actually providing, friendly, inviting and welcoming settings in which to learn. This was primarily to address the above mentioned barriers of lack of confidence, trust or expectations amongst workers seeking to learn collectively, with the objective of enhancing a sense of agency with individuals.

In attempting to build self-confidence and self-efficacy within trade union learners, in part through providing engaging environments in which to learn, ULRs are also described by research respondents in this thesis in terms of enacting the tasks of a Gramscian style organic intellectual, in accordance perhaps with Stevenson's (2008) hopes and vision. ULRs and others speak of direct links between their union learning experiences and improved or further developed union organising activities in both individual and collective terms. This has led some into a more politicised understanding and engagement within their union, workplace or community. Allied to this is the clearly enhanced development of collective union values and ideals. Within the entirety of the voices captured by Ross et al (2011), including ULRs, other types of Reps and non-post holding members alike, conclusions can be drawn that indicate the agential capacity building aspects of union learning. This is achieved in large measure by a combination of empowering learning environments, the promotion of equity, equality and diversity in education, and the motivational aspects of its pedagogical approach. Indeed for some the process of learning is seen as an oasis in a desert of intensified work regimes and deteriorating industrial relations, resulting to some extent in enhanced union, social and democratic involvement.

#### **6.4. Transformative Learning: trade union pedagogy**

Theories of transformative learning, including the active engagement of learners as adopted by the TUC (n.d) and others within UK labour education, hold that the aims of its methodology and pedagogical approach are to equip learners with a number of essential attributes. These attributes are key to the

achievement of both personal and collective trade union advancement. The first of these is the ability to think critically, that is to question and analyse the everyday needs, aspirations, challenges and problems that directly effect individual workers, unions, their communities and issues of wider social justice. The attainment of critical thinking amongst learners should lead to greater confidence in interpreting the world around them, and again this can be in both a personal, individual sense, whilst also referring to a collective confidence. Further, learners should develop an awareness of the value of their own experiences and how they can bring them to the collective learning environment for the benefit of all. Individual and group experiences then become the foundation upon which any learning is constructed and taken back into the social or work environment.

A collective approach to solving problems represents an unsurprising objective of learner development within any theory of active learning and this approach evidently sits comfortably within traditional trade union values systems. Finally, a commitment to action is a learning outcome that is promoted by active learning theory and again this can be simultaneously both individual and collective. Learning is seen as motivating in itself, as is mixing with like-minded others and overcoming problems together. This results as it should in not only learning for learning's sake, but also a sense of wanting to adopt an active position. It is therefore these key attributes that form the essential and intended outcomes for learners to acquire, emerging from all union courses based upon active learning methodology.

For the research respondents that speak of the usefulness of the pedagogy employed within their courses, the approach seems to meet their needs. Jane uses the phrase "blended" as she describes the mix of learning methods. The weekend course for her contained "some teacher talking to the class, there were power-points where necessary, videos where they were useful, but also plenty of time I thought for discussion, I can definitely remember that". The recalling of sufficient time to talk with fellow students about issues appears of importance to Jane as it has remained vividly in her memory, albeit the group size could provide difficulties. "It was quite a large group, much bigger than

any other course I'd been on actually, so it's not easy to do a round table discussion when there's that many people, but I thought it was quite good".

Sectorally based group discussions were also employed as Jane recalls "being split off into our groups. We were put into groups relating to our sectors or where we worked,.....so mine was more of a public sector group,.....so it was a real mix of pretty much any technique I've seen of any other course really". In terms of offering practically applicable skills to convey back to the workplace or trade union organising environment Jane also feels that "it gave me some of those tools really to take things apart a little bit and take things a bit further, and where to look, so it was very valuable.....in a 'life' kind of way". Jane's course was a two-day, weekend, class-based, tutor facilitated event, from which it would appear that analytical skills, alongside some further self-directed research skills, led to a sense of active post-group immediacy of general experiential application. Whether this would hold true of the other primary learning formats employed by the TUC and others, that of on-line courses, remains an open question.

Simon offers some insights into on-line learning as he undertook the TUC *Diploma in Contemporary Trade Unionism*. He concluded that "definitely" the course was of value to him, albeit with the caveat that being an information technology professional he felt "comfortable in using internet and stuff to actually learn, I was quite pleased with it, it worked very well for me", although with a second caveat he was "worried about the phrase 'online diploma', it's online, it's a diploma, how on earth will that work?" Part of the answer for Simon was a high degree of available and continued support, which for Simon "kept me coming back to keep on doing things rather than kind of like wandering off half way through the course". Consistent, focussed, quality support from course facilitators thus appears to be key here, in part to allay fears over distance, perhaps isolated learning methods with students who are studying at higher academic levels than ever before, stretching themselves in the process. This was certainly the experience of the author when completing the on-line TUC *Going Global* course as the tutor role became pivotal in retaining any group focus, camaraderie and to a certain extent individual

motivation. The student withdrawal rate was significant on the author's particular course.

On-line and distance learning can of course be seen as trade union learning adapting itself to the requirements of the digital age. Unions have also had to adapt to the changing needs of their learners as employers compress the time available for workers to undertake self development. As Simon explains,

“The thing they have done is they've adapted the sections of the course as well, something called TUC e-notes, so they've kind of taken parts of the course as little briefings that they can give out to people and say 'well, you don't have time to do a diploma, how about just popping in to just log into the site every day, every week for a month or so to find out a bit more about equality or diversity or history', stuff like that. They are really trying what they can to make it an attractive proposition and a useful proposition to keep people active in the unions”.

One drawback of on-line, distant learning methodology identified by Simon related to him feeling that it “didn't have the immediacy of being able to look in the trade union library, like I did at (name of library).....It wasn't like walking into the place that had all the old Plebs magazines that we could take a look at”. Tutors also express reservations about the limitations of distance learning methods. “I have delivered on-line courses but the problem is that they don't easily lend themselves to a collective approach, you don't get that all being together and sense of collective, that's the trouble. That's why I prefer direct classroom based courses” (Derrick). Values surrounding collectivism and its inherent sharing processes obviously remain germane for some. Of further note here is that the distinction between on-line digital learning and immediate collective classroom based approaches is perhaps becoming less precise as Denis informs us that upon the GFTU *International Solidarity* course, “people were encouraged to bring their laptop along and there was various activities where you would look-up organisations”, thus blurring any clear distinctions between different learning delivery methods.

Like Jane, Simon felt that the pedagogy used enabled his active, dynamic engagement, leading to practical outcomes. It involved for him

“different research tactics, .....it was really teaching you about the subject but also showing you different things to do so we looked at, and interpreted, data on a couple of the modules. We looked and found out about where you could find all sorts of information, and how you collate information as part of doing each of the different bits and pieces about trade union history, about globalisation, trade unions”.

These skills then culminated in “the research project where you could use all that you had learnt, techniques you’d learnt to actually do the piece of work”. Simon’s comments indicate the pedagogical utilisation of techniques designed to advance self-directed, self-motivated learning that accrues the necessary skills and abilities in a graduated manner. The skills involved being data gathering and organising, data interpretation and the integration of differing subject matter at Diploma level. The exact role, facilitation skills, knowledge and experience of course tutors within pedagogical approaches are also important for Denis as he felt whilst undertaking the GFTU *International Solidarity* course that,

“the tutor’s style was to invite more political discussions and to encourage people to express their views.... interactivity, a lot more discussion and exploration of the issues with an expert tutor available to try and guide the discussion and answer questions..... Also the fact that you know the tutor has been out there, put his life on the line and done it. You know he is no ‘hotel journalist’ , he is someone getting out on the street talking to people, talking to workers and finding out what the real issues are. ... the amount of energy he was able to generate was phenomenal. He was getting you enthusiastic by proxy”.

In identifying what Denis experienced as an important aspect of formal course delivery, the commitment of the tutor, his comments allow us insight into the levels and complexity of learning that individuals bring to any given course. This is evidenced by Denis as reflecting on the *International Solidarity* course he makes reference to an associated but distinct topic of interest to him, one that he conflated with the primary course content, namely journalism. As he enthusiastically puts it, “when I got home I brushed off my camera equipment and I was thinking ‘I just got to get out there, got to do something’! So he did inspire me to do more”. Denis’ previous life experience and field of

employment was re-awakened within the wider aims, objectives and general scope of this particular GFTU course.

Although no extensive and precise understanding of a pedagogical methodology of transformative learning exists, as acknowledged by Mezirow (1991), and others (Dirkx, 1998), central elements of any approach are discernable. These include developing teaching techniques that foster and enhance the deep engagement and active participation of learners. Teaching methods that allow for self-created constructions of knowledge within a learning process that allows self-determination to unfold is essential. As with all adult learning, but particularly so with transformative approaches, learning opportunities must be multi-modal, multi-focal, and multi-layered. Values of personal significance to the learner must be fostered. The opportunity for learners to enter into a two-way, dialectical relationship with others in their community or society must prevail. Finally, all learning must be grounded in the experiences and cultural contexts of the learner. As Dirkx reminds us these practices should support “adult learning as a meaning-making process aimed at fostering a democratic vision of society and self-actualisation of individuals” (1998;9). When practiced for some time the developmental experience can become “a way of *being* rather than a process of *becoming*” (Dirkx, 1998;11).

When documentary data related to issues of trade union pedagogy are examined, prominent amongst the findings is the utilisation of debate or discussion as an adult teaching and learning method. This is followed closely by listening to guest speakers, self-directed research (largely internet based), and signposting learners towards expanded sources of available information. Undertaking group activities then presents as a strong thematic influence, closely ahead of expectations of learners engaging in reading, undertaking group presentations to colleagues, and accessing tutor/mentor support. Discussion and debate, especially if related to personal experiences, clearly fall within the parameters of Mezirow’s (1990, 2000) emphasis on the value of these aspects of adult learning, as do notions of self-directed learning within andragogical perspectives (Knowles, 1973). Working as a group when

exploring or examining issues also falls into active learning theoretical parameters. The value of exercising a degree of choice in directing their learning into whatever avenues they select certainly infuses participants' narrative accounts. This approach however reflects an interesting method on behalf of union learning as it offers scope for the risks inherent within knowledge creation and control.

Examples of isolated pedagogical methods included utilising museums and unpaid work experience placement. Thematic reference to the use of books and libraries was slight, occurring mainly at Degree level, with the implicit use of the internet being across most courses and involving both course content and as a pedagogical method. Explicit references within documentary data made little of reflection on and review of learning and knowledge creation, although access to course tutor or mentor support may have facilitated an amount of this occurring in a latent fashion. In terms of any overlap with informal learning, some form of study visit was involved in three of the courses examined, alongside unpaid workplace experiential learning, whilst the value of social events were made explicit as part of two courses. Themes of trade union pedagogical approaches and their utility for learners is examined further in the next chapter when they resurface through respondents' voices. In summation, the dominant themes of group learning balanced against self-directed learning, both allied to valuing human experience, echo the notions inherent within conceptualisations of adult developmental journeys (Mezirow, 1990. 2000; Knowles, 1973).

Thus far we have explored courses and learning pathways up to and including Diploma level. Taking that now to degree level, are similar glimpses of transformative learning and associated pedagogical methods discernable? For labour and trade union tutor Robert, we are reminded that "active learning can have a number of different meanings". Nevertheless, Robert expresses a tendency to perceive of "active learning as a phrase to mean that people are actually engaged with their learning, or education, .....One of the things we've tried to do within learning.....is to get them engaged in talking to each other,

discussing”, indicating techniques of adult collective interaction, participation and involvement. Further, for Robert,

“education is at the same time very complex and very simple. The simple thing is you start from where the students are, which you generally do with active learning because you use some kind of discussion or quiz or activity which gets them thinking of where they are and then you move it up from there, in slow, incremental steps. The complexity is in how we do that..... The point is that where they are starting from is generally around their own workplace or union or experience and you’re trying to put in place a little ladder of progression so they move beyond that and into the world”.

At degree level it would seem that the art of starting learners within the context of their workplace and trade union environment is of importance, albeit then moving them away from their immediate experiences and gradually into academic literacy. This is not only required, but as Robert informs us, at times challenging as one of the difficulties with unionists is that “all the time they try to give you stories about what they do at work or what happens in their union and you’re trying to get them to think theoretically and conceptually”. Additionally Robert encourages learners to try and think about issues in differing contexts to those in which unions usually function. “So it’s trying to get students to think about and locate what they do in (different) context.....this is taking them beyond that, beyond their own experience, beyond their workplace”.

Within Robert’s account we also return to the theme that presented itself earlier within this section, that of the apparent value of history within trade union learning. The *BA in Labour and Trade Union Studies* contains modules relating to British labour history and European labour history. Robert’s design of the course deliberately contained historical content as he indicated. “When you design a course you can design a hundred different ways, so we have various themes, one is political economy, the other one is industrial relations, then the other one is labour history”. For Robert and his colleagues, aspects of labour history are woven into the overall fabric of the programme as,

“with a lot of these things it’s how you teach them, so you can teach history as though it’s completely dead or you can see it as a pathway, you know, ‘this is where we’ve come from, this is where we go to’. It feeds-in with a lot of the other things we do.... we try and make the links, so again, if you’re looking at political economy you’re trying to understand how it is that we went from Britain in the height of Liberalism in the 19<sup>th</sup> Century, through to social democracy in the 20<sup>th</sup>, through to the neo-liberalism we have now, so that’s a lot of history muddled-up with economics as well”.

It would thus appear that the thematic of union history weaves its way through certificate, diploma and degree level study pathways. Further to his mentioning the subject of continuing learning pathways, for Robert the BA can lead onto many MA’s in the Social Science field, the specific MA in Labour and Trade Union Studies offered by the Centre, or a Professional Doctorate (DProf) or PhD offered by many universities. Robert himself certainly tries “to encourage some of the students who did well in their dissertations to go onto a PhD”, as a natural progression route.

Those respondents studying at an advanced level included Mike and Denis. Both expressed strong tendencies for enquiry and exploration. Mike, himself examining issues of globalism and solidarity through digital technology, formulated within his narrative were questions involving the agency that social media offers and the role that “social media plays in identity formation across the labour movement”. Critical enquiry as a way of being was expressed by Denis who described it as,

“looking at alternative perspectives, not just taking what you’re being told at face value. Looking below the appearance of something to the reality of something and being critical.....questioning and asking.....not just taking things as wrote.....look around something, maybe do some research of your own to find out if it’s true, really. For me, that’s what being critical is....you start digging down into to something and ask, ‘how did that come about?’ Certainly if you’re training trade unionists it’s essential to train them to ask the difficult questions that aren’t being asked by others”.

This articulation, whilst not a commonly presenting theme within the research findings amongst those learning at a lower academic level, does capture and summarise both the latent and explicit questioning apparent within the majority of respondent narratives. As we have seen, Denis has been an

experienced activist and learner over many years, having always enjoyed rational debate, valued experience in others and reflected upon his union engagement.

In this chapter the breadth of courses available is evident, ranging from certificate level through to first degree and above. It could even be expanding in number. This is part of an overall strategic approach of trade unions to challenge unfair treatment of workers and any perceived social injustice. Courses are open to most trade union members via their own particular union, the GFTU, the TUC, or higher education institutes. The larger unions such as Unite are taking the lead, due in part to their greater availability of resources. Learning pathways are available to learners from foundational to advanced levels. Growing awareness through learning of transnational concerns to union members or any developing sense of globalism seems apparent within the findings amongst those respondents interviewed. Synergies between transformative learning experiences, embryonic agency development, and active solidarity formation are evident in those drawn to formal learning within a union context. The complementarity of course subject matter and pedagogical approaches utilised by union learning facilitators appears to chime well with adult learners, allowing space for personally relevant, self-directed, creative and dynamic solidarities to evolve and incrementally emerge in everyday places and spaces of human activity.

## **6.5. Documentary Data Themes**

In addressing our initial research question of why trade unions expend resources on promoting transnational solidarity and associated matters, we must also turn to and interrogate the documentary data and previous survey data. This data allows us to explore further our questions relating to the learning pathways available to union members, including if and how resource provision and allocation culminates in a coordinated strategic response through learning. The majority of collected and collated documentary data stems from formal course materials. These range from Certificate level study

up to Masters Degree level study and includes course promotional materials, course handbooks, course programmes, 'handouts' and accompanying resource manuals.

Thematic analysis of this material can be divided into two distinct areas of interest to this thesis, namely course content and course pedagogical methods. Although these themes are located here in relation to documentary data, they initially surfaced earlier in relation to the narrative data collected. Here they are examined in more depth with regard to formal learning programmes which should afford some scope for contrast and comparison. Before proceeding further, it is of note that expressed course aims and objectives relating to critical, analytical, or conceptual learning occurred increasingly at Diploma level and above, whilst Mezirow's (1990, 2000) emphasis on the centrality of experience and rational discourse could be seen to pervade all programmes at all levels. Of further interest at this juncture is that use of the internet as both a learning tool and as a means of supplying course content, especially through 'signposting' to additional resources, as this was explicit and universal throughout all courses.

Of final note, perhaps as an area for future exploration, the learning timeframes of each course are not analysed, albeit they may be held to impact directly upon the adopted pedagogical approaches. Similarly, financial sponsorship of learning events or programmes is not explored in this thesis, suffice to say that some of the more extensive events were co-sponsored between several different unions, whilst for other events DfID provided much of the initial funding through the SFPA. Formal courses involved such timeframes as residential week-end learning, week-long residential courses, occasional day attendance over several months, distance on-line learning, part-time evening study, 'blended' approaches, and full-time study, with some courses ranging over several years.

Beginning with analysis of the thematic content of the specific courses examined, the predominant themes related to learning in respect of trade union organising, the international union movement, globalisation,

international development, union campaigns, global commerce, and solidarity. Whilst some of these themes may appear obvious due to their being the declared central focus of specific courses, the theme of union organising is firmly embedded in all courses despite it not being an explicit, immediately presenting reason for providing any particular or given learning event. This category again expands if conflated with its adjacent themes of union campaigning and the theme of worker inclusivity. This indicates the deeply ingrained nature of union organising within all its learning and education programmes. Whether it is with the tacit agreement of funding providers or whether organising strong unions is a pre-requisite to supporting such aims as international development, both remain key questions. Either way it would appear that learning about aspects of globalism provides ample, if latent, organising space for unions. When related lesser themes, such as organising of youth for example, or for leadership, or internal democracy, are encompassed within the general theme of organising, this becomes by far the most dominant thematic aspect.

The thematic thread of labour solidarity was explicit in eight of the twelve courses examined and was associated with sub-themes relating to partnership working. Notions of solidarity were implicit in ten of the courses. Less explicit themes included for example learning about Europe, the media, poverty and worker rights. Again, all themes can be seen to lead to aspects of trade union organisation, supporting the mantra that good learning looks like good organising and good organising looks like good learning. The dominance of the organising theme assumes that learners want to study some form of union organising at either a local community, trade union Branch or transnational level. The theme of poverty is of interest as it attracts significant attention within participant narratives as an entry point into engaging with learning and subsequent activism, yet features in only a limited manner within documentary data. Isolated subject areas included imperialism, climate concern issues and technology within work. Whilst individually limited in extent, if clustered around a thematic title of diversity or inclusivity, issues of women within trade unions, black workers, migration, role identity, and gender analysis, collectively formed a considerable thematic grouping.

Whilst it is not claimed here that this thesis has encompassed all available UK trade union courses it offers a snapshot of what is available today. The courses surveyed give an indication of why UK unions feel the need to offer and supply such learning events, driven as they are by the consequences for workers of some thirty years of neo-liberal globalisation. For unions, organising is now deemed to be critical on a local to regional to global scale if the development of a sustainable, ecologically sound employment process is to be sustained; if union rights as human rights are to be defended; if world-wide poverty is to be overcome; and if practical solidarities are to be demonstrated. Additionally, organisation to address the position of women in unions and in the global labour market cannot be ignored.

The predominant content thematic underpinning all others is therefore one of organisation. Organising is either explicitly or implicitly woven into all that UK unions undertake in relation to issues of globalisation and globalism through the learning provision on offer. The predominant themes relating to our questioning of pedagogical methods are those of discussion and debate, allied to group activities, followed by self-directed learning through research. Also, the powerful impact of guest speakers within learning events cannot be underestimated. Further still, this chapter has assisted us in focussing upon our research question relating to the learning pathways available to union members. Courses explored here form a progressive route from Certificate level to that of Masters degree and beyond. They are provided in traditional classroom type spaces as well as virtual learning environments via the internet. Tutor support is offered in both learning formats.

Lastly, to what extent is an overarching strategic approach to addressing challenges resulting from globalisation, the development of attitudes of globality and trade union transnational solidarity apparent within the research findings? The range of course subjects, comprehensive course content and extensive qualification pathways are suggestive of a strategic response to the impact upon workers and unions of neo-liberal globalisation. This however varies between individual unions, each of which presumably responds as it

sees fit in the interests of its members and in the context of its available learning resources. Formal courses are available to all unions affiliated to the TUC or GFTU, including courses on-line. Some learning events, as in the case of the GLI *International Summer School*, are financially and materially supported through partnership arrangements between several unions and other civil society actors. In the next chapter we look at how effective UK union informal learning events are in promoting and fostering solidaristic activity amongst members. This further relates to how they are positioned within the overall context of learning opportunities for union members and to what extent they may complement formal courses.

## **Chapter Seven: Informal Learning for Solidarity**

This chapter looks at the research findings relating to informal learning. Its focus is on how respondents prefer to situate their experiences in relation to trade union informal, incidental and non-formal learning in the context of global awareness and solidarity building. The primary theme of informal learning is one that emerged as the research progressed and it is issues surrounding informal learning that drive the remaining areas of analysis within this thesis. The framework offered by mobilisation theory will continue to underpin any conceptualisation of what aspects of union informal learning opportunities may be assistive in activating members. As we proceed we will also continue to examine the interwoven themes of personal agency and any sense of individual hegemonic awareness incorporated within transformative learning journeys.

Within this chapter, as previously, we make use of understandings of formal learning as being provided by institutions, practiced in classroom settings and heavily structured in nature; informal learning as including incidental learning, being less structured, occurring in settings outside of an educational institution's classroom, and where, significantly, the learners have greater control of the process; incidental learning is that which results from everyday human experiences (Marsick and Watkins, 2001). Having said this, Colley et al (2002) assist us in understanding that to draw any clear and unambiguous lines of demarcation between 'informal' and 'formal' learning is near impossible. Nevertheless, any attempt to do so needs to focus upon understanding the social and political context and content of the learning before the mechanics of place or form.

Further to this Foley (1999) reminds us that the ideological contestation that occurs within informal learning, just as much as formal learning, remains "central to the process of cultural and social reproduction and transformation" (p16). We must also remember that the iterative process of action followed by reflection, leading to further re-designed action, that is praxis, constitutes an educational experience in itself (Freire, 2000). Our approach of understanding

everyday worker solidarity as being located on a spectrum or continuum of lived experiences ranging from an initial affective response through a range of responses leading to dynamic, pro-active, material engagement or determined behaviour should also assist in interpreting research narratives.

Whilst proceeding in this chapter within the wider parameters of our conceptual framework we additionally need to offer analysis of certain lesser themes that present themselves within the data in relation to informal learning. These can be categorised in respondents' narratives firstly with reference to the role of ULRs, as these 'change agents' (Dean, 2007) promote informal as well as formal learning in the workplace, signpost workers towards all manner of learning opportunities and foster strategic links with union organising agendas. This all occurs within underpinning concepts of lifelong learning and incidental learning for workers. Secondly, trade union and labour conferences come prominently to the fore within narratives as spaces for informal learning. Finally, union internet websites and internet usage present as thematically substantial within the data. These three emergent themes would thus appear to offer union members substantive relational opportunities and spaces for possible global hegemonic contestation through informal knowledge acquisition, skills sharing and personal attribute development. Through building upon Susan's comments we begin by identifying that,

"You can't have the formal without the informal, they work hand in hand.....you see the formal attracts people who are academics anyway and interested in the subject because they've come across it in some other area of their life, but for those people who are not, the majority of them are very busy running around. You've got life to get on with, and there are things in the news or in a magazine perhaps, but it's fleeting, it comes and it's all so awful and then it moves on, and it's that bridge between 'isn't that awful' and that feeling of having to do something about it, then giving people the tools to be able to do something about it, the sort of small steps".

For Susan, the links between formal and informal learning appear inseparable and indispensable, as too is the wider context in which learning occurs, that of workers leading busy lives. As an award winning ULR the solution to

encouraging workers into learning, including learning for solidarity, would appear for Susan to be the gradual equipping of individuals to actively engage in the process through having the proper tools to hand and taking initial, tentative, steps forward. Workers are led into learning she believes by feelings of what she describes through her narrative as 'natural justice'. Susan further reminds us of the affective power of media stories and the challenges of attracting non-academic learners.

### **7.1. ULRs: signposting solidarity**

The role of the ULR encompasses to a substantial degree the arena of informal learning. To what extent though do they not only engage with global matters within their own personal developmental journeys, but also signpost colleagues along informal learning pathways into transnational solidarities? Within the research sample, in addition to Susan three of the other participants currently hold or previously held the role of ULR, one being female and two male (Jane, Mark, Simon). As we shall see the ULR narrative accounts seamlessly move between experiences as workers, union Reps and societal agents, with little or no distinction between which roles or identities privilege, influence or shape the others in terms of solidarities awareness or promotion. The employment sectors they represent are those of criminal justice, transport, finance and government. Interestingly, within their respective interviews none other than Susan made extensive reference to signposting colleagues at work directly towards informal learning opportunities involving a transnational or global dimension. In Susan's view, lack of interest was the primary reason for this.

From Mark's interview no immediate or sustained demand from workers for transnational perspective learning was apparent. However in his experience, awareness and subsequent interest grew as individual workers became gradually more insightful to the fact that global issues impact upon local issues, with Mark reflecting that,

“no, people didn’t have that on their agenda.....initially to start with, possibly no, but then as peoples’ learning journeys progressed, they became more active in the union and then obviously they became more politically and globally aware,.....through the medium of education, because these are big issues and quite difficult to understand without the fundamental learning skills needed”.

For Mark and other ULRs there appears a clear line of personal incremental development into union activism through learning, leading to greater political awareness followed by a greater sense of globalism. Learning how to learn is a contemporary slogan used amongst educators and here for Mark the maxim appears to carry some importance and relevance as he identifies foundational learning needs that underpin any potential transformative journey, themes that are explored further below.

In Jane’s case she also found little or no immediate call from her union’s membership, or non-unionised work colleagues, for information, advice or guidance relating to global or solidarity awareness raising events. She did find nonetheless that “it comes in, but in bizarre ways” as she took every opportunity, however unexpected and diverse, to foster awareness and promote informal learning opportunities in whatever contextual situation she found herself in. Having herself completed the *GFTU International Development Champions* course Jane was also in a position to use her knowledge and experience to manufacture informal discussion and self-application at numerous events, these being either employer related, union related, or civil society generated.

It appears that for Susan any lack of interest from colleagues regarding informal or even formal educational opportunities surrounding global issues had proved somewhat frustrating. This led to a significant and possibly unique informal degree of direct action to address the issue of awareness raising amongst colleagues. From a starting position of asking the ultimate question about “people who don’t have an interest, we’re not engaging with them, how do we get those on board, bring them into it all”, Susan eventually devised several practical educational methods such as board games and a handicraft exercise. This resulted in getting people attending Learning at Work days

“who wouldn’t normally have walked through the door if we’d just said ‘we’re running a session on international matters’ or ‘global awareness’ or used any of those names. I don’t think they’d have come through the door, but presenting it in such a way was engaging”. Practical, hands-on activities conducted within informal spaces are certainly seen by Susan as the first step to engaging colleagues at work, leading them over time to a more formalised interest and deeper active trade union engagement. The use of particular language or terminology is also suggested as playing a contributory role in attracting others to informally engaging in this topic.

Despite the apparent general lack of interest or awareness amongst workers with regard to global matters, it is apparently the case for Susan and indeed her ULR colleagues that in relation to the individual mobilisation of her co-workers, tapping-into notions of injustice is the key to capturing their interest, imagination and emotional engagement. Making links for colleagues between, for example, globally wide issues of injustice, such as childhood poverty or employment, to the highly personal and immediate lives of potential learners is essential and would accord with Kelly’s (1998) central aspects of understanding what activates individuals. Doing this creatively and in an easily accessible manner, perhaps in a light-hearted manner at first, is the way forward for Susan and her colleagues.

Perhaps Moore (2011) addresses the most pertinent question in relation to this thesis when attempting to situate an understanding of the role of ULRs within the framework limits of mobilisation theory. Is trade union learning, in particular any grassroots understandings and daily application of the ULR role, simply another union membership service, designed to be materially beneficial to union members or attract non-members into the fold? Or alternatively, does it perform a wider task that encourages, empowers and activates all those that come into contact with its workplace manifestations, either formally or informally? In exploring the ULR role in relation to the values that Reps hold, the relative newness of the role, and the relationships that ULRs have with employers, including aspects of recruiting, bargaining

and organising, Moore begins to envisage this Reps position as a doorway into increasing mobilisation.

Indeed, the narratives of respondents in this thesis strongly suggest that injustice is the *sine qua non* on a global scale for the activation of colleagues through learning, in both a labour arena and a wider social justice dimension. As Susan clearly articulates, “what I’m seeing is that most people actually desire natural justice and when they become aware of an injustice they look at ways to address the imbalance”. A strong sense of injustice is the primary motivator, as for Susan, “that’s the thing I’ve noticed that triggers people more than anything else, is that injustice”. Developing the sense of immediacy and impact regarding an individual’s feelings and relating them to the sphere of their everyday work or broader social life is of importance as then they “suddenly realised how fortunate they are themselves or how someone else is.....being abused in some way, their working conditions, or the fact that we take for granted clean water and that’s not the same for everybody”.

For ULR Mark the experience of injustice related more to the immediate labour arena and in particular to what he terms employer hypocrisy and double-standards, as workers are “expected to do the same level of work in one country, and treated a lot worse through multinational organisations as they would be in this country”. Mark’s testimony infuses glimpses of both shared interests with other workers around the world, the attribution of responsibility and possible culpability, all alongside his identification with global labour. As a ULR Project Worker for his union, the RMT, Mark was particularly aware of the potential of informal and incidental learning for migrant workers, many of whom find difficulty in accessing formal courses. The attribution of responsibility and implied culpability was difficult to escape with most ULR respondents as the employment practices of transnational corporations came to the fore on numerous occasions, as again, “working together as a trade union, globally, I think is important because there is that divide and rule mentality still with a lot of large corporations and it’s only if we start working together that we can actually address that really”. This theme

also resonated with Simon, this time with an acknowledgement of the informal power of the internet, of which more will be discussed later in this chapter

“so we’ve had great success in working with Siemens to make agreement whereas at the same time in America, in the Maryland offices, they’re busy conducting a union busting campaign, .....Siemens bill themselves as a global telecommunications international business, yet they don’t have a global look because they will quite happily treat workers in one area of the world totally differently to another.....It’s interesting about the double standards isn’t it, but that’s the thing, before these unions were hooked-up we probably wouldn’t care about workers in the same company”.

For PCS member Jane, with her focus and area of personal interest being that of supply chains, there are obvious questions leading her along her learning and union activist journey. “So why isn’t everything produced in a way that people are not suffering in that chain?” A straightforward question, but one weighted with notions of inequity, ethical and moral imperatives, and labour inequality. Whilst thinking globally, Jane also locates ideas of inequality much nearer to home, as “there are gender specific issues I think.....within the Ministry of Justice there definitely are, it’s quite male dominated, so I’ve become more involved in that kind of area, and certainly you start to think more and kind of look around at things and think, ‘yeh, ok, there are some things that are a little bit difficult’”. For Jane these were questions that presented themselves to her at an early phase within her personal learning journey as she sought answers to them prior to undertaking any formal trade union educational courses.

We can also see how some of the ULRs interviewed drew upon historical events and notions of identity, injustice and attribution gleaned from their longer term experiences and related memories, later evolving into political awareness. For Mark this was his experience of the Thatcherite era in Britain which “had a devastating impact and the sort of impact the Tory reforms had on industry and (the city) as a whole, in my memory, sort of meant that I left school with no formal qualifications; I grew up on a Council estate with just the bare minimum to get by, so these sort of initial interest had began to evolve”. Mark’s narrative further serves as an indicator that lifelong, informal

transformative journeys and lifewide experiences start at an early age and that informal learning journeys start from different places. Informal roads to transnational awareness, some form of activism, and growing political awareness certainly began prior to respondents entering any formal educational or learning spaces.

Mark's formative earlier life experiences led him to "do some voluntary work out in East Germany....six months after the Berlin Wall came down....and it was still a Communist government". This for Mark was an eye-opening experience as "the people I met were brought-up in the Communist era and their sort of attitude to work and stuff like that, and their thoughts around the West, it was quite interesting". He later visited Namibia very shortly after its transition from being South West Africa and found himself to be "kind of like the first people to go in there, doing volunteering work....with the Bush People and it was really interesting to see what was happening at the time as apartheid was coming to an end". These examples again serve as indicators of the impact of informal, extra-union personal development that can be drawn upon and used either individually or shared collectively.

Trade union educator Klaus recalled that he had "always had an international interest because I'm not from Britain in the sense that my parents aren't from here. I was very conscious growing up that they were obviously immigrants from another country,.....and of course when they first came here the country hadn't even been created, so one of my earliest experiences was when the civil war broke out". This incidental learning experience appears to have begun to shape Klaus' awareness of issues as "growing up there were key events that you couldn't not notice... like the Vietnam war.....you're conscious that there's a much bigger world out there". Voluntary Service Overseas (VSO) work in Tanzania leading to later working as a Unicef Educational Representative upon return to the UK was for Liza an early biographical episode in her life prior to entering formal union learning. Interestingly, whilst having such vast travel experience and insight into international issues, Liza expressed the position of several non-ULR union respondents when she indicated that later in life "I didn't realise the NUT was

involved in action, campaigns overseas!” She is now fully aware and signposts others to any and all informal awareness raising events.

Liza was not alone in expressing this position, which in itself may beg questions surrounding the promotion of union activities within the organisations themselves, especially to their busy membership. Although all respondents had quite extensive overseas travel experience, their life biographies of movement into activism could start just as close to home. With a strongly directed ethical and moral compass, Jane took her early steps in her local supermarket when “it was also a time for very, very cheap food. Ten pence for a loaf of bread and eight pence for a tin of beans and that kind of thing, and I started to get an awareness of, “if that low price is being paid by us, how could you get something on the shelf for that price....that interested me, certainly growing up, as food wasn’t that cheap!”

As with any life journey however, there may be enforced or voluntary intervals along the way in which informal learning is situated between formal courses. As Jane pointed-out “at the time my daughter was younger, so it was quite hard to balance that kind of intense study, whereas I think now she’s older it might be a bit more realistic for me to do something”. Taking breaks from learning before trying to re-enter the formal educational field can be daunting, as again for Jane, “I hadn’t done any formal learning for a little while so I was kind of finding my way back into it”. Learning journeys into global awareness, it would seem, need to have acknowledge milestones of achievement and to be punctuated with breaks into which lifewide, informal and incidental learning prevails. Whilst Jane perhaps gave little thought to the value of her lifewide learning experiences, trade union pedagogy accommodates this as it is seen as being of significance and importance. This extends to Mark’s, Liza’s and Klaus’ pre-formal learning outlined above as all life experience in the learning philosophy of unions should be drawn upon in a shared, safe and empowering learning space (TUC, n.d).

As Mark, Klaus, Liza and Jane took us back in time when recounting their informal learning journeys prior to entering formal education, so Jane’s

account also carried the theme of growing political awareness. For example, when asking if ULR narratives indicate personal positions other than those demonstrated by the practices of some TNC's, then perhaps Jane gives us a clue. She indicates that "we now know, thanks to Occupy and various organisations, who holds the wealth, and then there's the other 99% of us, and so there are very few people who own the money". Global wealth distribution presents as a key issue for Jane and she is clear that she positions herself with the vast majority of global citizens who hold relatively little of it, or the power that comes with wealth. With reference to attributing responsibility for inequity and inequality Jane makes reference to the complexity of global trade and the influence of global agencies upon national politicians, indicating that "they've got a huge amount of power and they certainly have a huge amount of power in politics as well..... So I think it's a bit of a rising pit of snakes really as far as that goes. It's very difficult to pin down who's at fault".

Expressing her views within the context of the global power relations between corporations, politicians, national citizens and workers, Jane concludes her remarks with the belief that as an active unionist who identifies herself with the global trade union movement, "that's where we are with trade unions being so important, because they are a voice for those workers, but it's also why people would rather we were not around". This discourse cannot be seen to sit neatly within the narrow confines of any UK government neo-liberal skills only development agenda as, when informed, workers can be seen to align themselves as they so choose and act independently according to their values, beliefs and personal creativity (WLRI, 2009; Payne, 2001a).

From the ULR interviewees, as both informal and formal agents of change through learning, we can see how their narratives can shift seamlessly between differing trade union learning, activist, organising and broader political themes. Ideas of equity, injustice, shared interests and identity, all within notions of accountability, prevail within their testimonies, indicating an accommodation with the framework offered by mobilisation theory. Thematic outcomes from the research would suggest that at least some ULRs hold a

broad-based view of the role that takes it beyond the narrow confines of employer or government led employability or national productivity oriented agendas and into wider notions of lifewide learning opportunities for all, including their own. This would challenge McIlroy's (2008) view of the ULR role as being tightly encased within a neo-liberal government policy agenda and expand it to encompass creative and innovative informal and incidental learning opportunities. It would appear from this research however that if the distinctive nature of the ULR role (Shelley, 2008) is to continue to flourish in a globalised world, it may require further development to ensure that initial and informal global solidarity awareness raising amongst members continues to take place.

Our findings could certainly support the view of ULRs presenting as both more agential within themselves whilst equally perceiving themselves as change agents at the same time. That is, motivated and creative individuals who generate new thinking and ideas, unlock potential in others and foster culture change that particularly assists socially excluded groups (Dean, 2007). Their narratives resonate with a crucial sense of self-efficacy, something that further learning reinforces (Gecas, 2004; Hammond and Feinstein, 2005). As Susan states it in everyday terms, "I am a bit of an evangelist really....In many ways that's the thing that brought me on to becoming a Rep in the very first place (injustice), and I think it certainly motivates me". This reminds us yet again of the power of feelings of injustice and how these drive individuals to perhaps overcome any lack of confidence they may have as they seek to engineer change. Bandura's (2006) closely related notion of self-belief in one's ability to achieve ones aims comes to the fore, as perhaps does Lambe's (2006) sense of personal control held by individuals.

For Jane her agential capacity was revealed through her expressed "feeling of achievement of having done a course of learning, whether it's a couple of days course, or whatever it is, and getting that certificate in the post and you think 'I did that', you know, and looking back at how I've done this list of courses you think, 'yeh, I've got certificates for all those now, I've done them', so that confidence does build gradually I think, alongside the knowledge". Her

comments echo Emirbayer and Mische's (1998) past, present and future aspects of their understanding of agency as the creative dynamic of Jane's past informal accomplishments, present day confidence and formal knowledge base for future endeavours appear redolent within her individual learning story. Jane's degree of emergent activism over several years would also appear to equate with Biesta and Tedder's (2006) understanding of agency as more of an outcome of action before anything else.

One of the key issues faced by ULRs perhaps more than any other is that of how to overcome the associated worker attitudes of both parochialism and pessimism in relation to positive change. These attitudes amongst trade union members persist as previous research has indicated (Ryland, 2007; Wills, 1998). Within this thesis Jane's testimony encapsulates how ULRs as change agents have to informally address "people who said 'well, what's it got to do with us'", with her typical response being "well it's got a considerable amount to do with us because it can mean that jobs are moved around very easily". Whether these types of comments are informed by parochial or pessimistic attitudes, or a mixture of both, can be difficult to ascertain. Either way, without the enthusiasm to challenge attitudes in informal spaces, for Carrie the end result can be a deep and pervasive sense of "doom and gloom" that stifles activism. Spaces for informal learning must surely be created by ULRs and others if this thematically significant finding is to be addressed amongst grassroots workers, as these uninterested or disengaged individuals will clearly not be the ones offering imminent active participation in union campaigns or accessing formal educational provision.

Similarly for Susan, "it seems too big a problem.....people then put it over to government, 'we can't do anything about it, it's going to take a lot of money, it's going to require new legislation, that's beyond me, I'm just going to shut down'", as individuals feel overwhelmed by both the global scale and the forces ranged against them, as "they do think 'I'm just a little person, how can I influence that'". Certainly for Heron (2008) international development models founded upon neo-liberal principles and practices have a harmful effect upon individual hope, human spirit and agency, this being increased almost

exponentially for the world's poor and marginalised. Welzel and Inglehart (2010) remind us of the negative effects of limited individual agency upon human well-being. For Novelli and Ferus-Comelo (2010), drawing upon the work of Panitch and Gindin (2000), overcoming a sense of pessimism and apathy regarding the possibility of social change is *the* most salient question within contemporary social movement discourse. Thirty years of neo-liberalism has brought levels of self-confidence to challenge social structures to an all time low. For them,

“one can everywhere sense the anxiety, an anxiety as omnipresent as globalisation itself, that has emerged with accumulating awareness of the enormous odds against (people)...we live in the era of foreclosed hope of a better world....even people who wonder whether the capitalist dream isn't the wrong dream see no way of realizing a life beyond capitalism, or fear that any attempt to do so can only result in another nightmare” (Panitch and Gindin, 2000).

Even for Jane, an experienced trade union activist, the idea of not only information overload but also the challenges facing people can be somewhat daunting, as, “at the very beginning it was ‘wow, all this and what do we do!’ You kind of feel at first, ‘well, do something about this, and how am I going to do this, it's all wrong.’ It just completely does your head in as it's just too much to think about”. Perhaps evolving experience gradually comes into play during an individual's learning, confidence, and empowerment journey, as Jane adds, “I think as I've gone on I've got slightly better at it”.

Several ULRs spoke of overcoming the feeling of being swamped by taking the ‘one step at a time’ approach and found that in relation to organising the informal personal approach continues to work best. As Jane further articulated, “it can be a bit overwhelming but I think you can.....speak to one person and engage them and they might speak to someone else and it might engage them and I think if you can reach one person or two people you might reach an extra couple out of them”. This sentiment was expressed by several respondents as not only the most productive way to overcome their own possible sense of despondency but also as the most effective and engaging method of involving and organising colleagues. Again, in relation to union

learning and organising agendas intersecting, the ULR approach of informally talking to colleagues in an ad-hoc yet informative, enlightening manner, is of thematic note within the research findings.

When thinking in terms of the counter-hegemonic positioning of workers in the context of solidarity awareness development, we must additionally examine if any personal sense of established or growing 'empowerment' appears thematically within individual learning experiences. For some within the thesis research this theme clearly develops within their narratives. Once more, perhaps within ULR and trade union tutor accounts as individuals further along the learning and activist road, but nevertheless also within narratives of early stage learners. As Gramsci reminds us, "every relationship of hegemony is necessarily an educational relationship and occurs not only within a nation, between the various forces of which the nation's composed, but in the international and world-wide field, between complexes of national and continental civilisations". (1971: 350).

For ULR Susan empowerment is one of the key feelings to convey, as "people don't realise how much influence they can have as an individual". This appears however alongside a sense of collectivism as "individuals are coming together as a group influencing stuff and it's trying to get that across can be quite powerful, as an individual when they link up with other individuals. It's that kind of message really, it's about empowerment I think". One respondent, Lisa, placed notions of empowerment within the more non-formal educational approach of using international study circles, "to enable people to have a voice, to action what they want to do.....it was those kinds of things I was very interested in...and how they were trying to empower people really". International study circles have certainly been championed by the IFWEA as an empowering model that can be seen as non-formal learning in which "local groups exchange experiences and information on issues relating to globalisation" and in which "active learning methods ensure a democratic and participatory approach to the global learning process" (IFWEA, 2000).

For some an individual sense of personal empowerment can be seen to manifest itself in infectious solidaristic action through a “message of support” towards other workers and trade unions around the world that can “strengthen their resolve”. Additionally it can lead to political and organisational awareness as “there’s also things like political pressure as being important as well, using mass political pressure to try and change something or raise awareness of something, and I think public awareness as well” (Susan). Again, in the above narratives we can detect the mingling of experiences of personal empowerment and solidaristic activity indivisibly infused with both non-formal learning and organisational engagement.

When informal and incidental learning is allied to opportunities for formal learning as evidenced within the narratives of respondents, with both of these then being situated in a trade union organising agenda, the complexity of the role appears within the findings. This would echo the view that unions themselves have moved the role from one of a ‘fringe’ activity to a more central position, adjacent to that of organising activity designed to provide union renewal in the UK (Moore and Ross, 2008). Whether aspects of any change of understanding within the role would include an ever narrowing governmental vision of the purposes of adult and employment based learning and training remains unclear from the findings (Moore and Ross, 2008). These findings would however complement previous materials in which ULRs offer their own personal motivations, understandings and practical application to the role (see WLRI, 2009), with a sustained critique characterising them as possibly unwitting agents of individualistic neo-liberal ideologies (McIlroy, 2008) being challenged.

In terms of ULRs creating spaces for workers to meet, reflect and organise in order to challenge the contemporary hegemonic neo-liberal discourse, the view could be supported from the research findings that ULRs could see themselves, as Stevenson (2008) does, as agents of change in the manner of Gramscian (1971) organic intellectuals. As previously seen with reference to formal learning spaces, Stevenson believes this is a pivotal role that could be upheld by ULRs as they find innovative ways to foster critical thinking within

employment environments so as to take ideological policy battles directly into the workplace. Similarly with Cumbers et al (2008) the ULR voices captured here could be heard as those of informal learning 'movement imagineers' acting as pivotal individuals fostering strategic change within unions or community movements. Others have certainly positioned ULRs firmly within European-wide understandings of change agents (Dean, 2007) as actors who deliberately aim to adapt the cultural practices and behaviours within an organisation or attendant community, providing improved participation and empowerment for all involved. Whether this position could be extended beyond the limitations of these findings to all ULRs would require further exploration. Nonetheless, if they are understood as being able to reach disadvantaged and hard to engage workers (Shelley, 2007) then the strategic informality of their approach must surely play a significant part in this process.

## **7.2. Labour Conferences: informal sites for solidarity learning**

In regard to wider informal learning opportunities, conferences were found within this study to form thematically notable sites of exploration, engagement and personal enjoyment for established and emerging active trade union members, what Foley (1999) would assist us in understanding as spaces of informal and/or incidental learning. These also prove fruitful as sites for political, individual or collective identity framing.

In relation to informing members about issues of potential value to them, especially through emphasising the place of injustice, trade union and labour conferences serve as strategic spaces for awareness raising and activity generation, perhaps also serving as embarkation points along new learning pathways. The daily realities of being a trade unionist or labour activist in another country can be in stark contrast to the everyday experience of UK workers. The strategic approach of inviting to conferences those who experience unfavourable union organising conditions can be powerful as Mariela's comments indicate.

“Colombia is the most dangerous place in the world to be a trade unionist. If this conference was taking place in Colombia today, half of you....would know colleagues who have been murdered in recent years, some of you would have arrived in bullet proof jeeps to get here, some of you would have a body guard waiting for you outside, some of you when you left this conference tomorrow would be followed home, some of you would have children who would have received death threats, some of you might receive funeral wreaths, or wives or husbands receiving funeral wreaths announcing that you would be killed soon. These are the daily realities of Colombian trade unionists”.

Whilst the Colombia example articulated above, by staff from Justice for Colombia (JfC), may be seen as extreme in nature, it is certainly not unique. Trade unions and bodies such as the TUC explicitly support the active involvement of such organisations as JfC within informal collective events.

For secondary school teacher Bini such events are all “about sharing ideas, meeting people, you learn lots from them. Can I tell you about something I did before, it was a ‘Global Partnerships as Sites for Mutual Learning’ conference and some lovely speakers came, you know”. Bini took what learning she had gathered from her speakers and “put everything on DVD, and then I show the power-points to my staff,.....then I came back and organised an ‘InSet’ day. So now I am on board, it was one of the best things I have ever done in my life”. She also reminds us of the workload pressures experienced by teachers as “here in England it’s not an easy job, there’s no time to breathe, especially in the State’s failing schools it’s really hard, you’re under pressure often, and all the paperwork!”, emphasising that non-formal learning can be an essential alternative for those facing time barriers to formal educational engagement outside of the workplace.

Similarly for Linda, her Napo union annual AGM/Conference was a window into greater political awareness of Majority World issues. “I really can’t remember what I knew about Cuba, but certainly.... attending the fringe meetings at the Napo conference, that’s where I got the awareness of the political situation”. Linda’s narrative also reminds us of conferences being one particular site of intersection between trade unions and civil society organisations, such as in this example the Cuba Solidarity Campaign. As with

Bini, Jane also found the need to explore further and feedback her learning to colleagues, in this case her union Branch colleagues. “it was informal learning I suppose, .... I went to the Haldane Society of Socialist Lawyers conference..... It was about human rights defenders so there were people from Russia...South America, ...Eastern European.... talking about their experiences.....I learnt a lot from that but was also able to report back”.

For Neal, who attended the Adelante Latin America Conference 2012, it was “refreshing to hear how progressive forces and social movements in the Latin American region are challenging the current neo-liberal hegemony that is impacting so negatively on working people, the unemployed and vulnerable sectors of society in Europe, and globally”. As an NHS staff member, who has studied at Degree level, the social and political paradigms that he was confronted with at the conference appeared in stark contrast to UK and European financial austerity measures. From the examples here it would appear that unions cannot afford to ignore informal and incidental learning opportunities afforded by labour conferences. They offer sites of mutual interest and collaborative learning in conjunction with global civil society agents, a space for partnership working that proponents of community unionism, it is suggested, need to invest in.

### **7.3. The World-Wide Web: a tool for global activism**

Another thematic avenue that emerged from the narratives on informal learning is that of the value of trade union websites. It would appear that these offer not only a progression route into awareness of issues but also a space for collective shared experiences. The internet has in recent decades opened-up a whole new window of opportunity for union education, agitation and organisation, essentially as a contemporary communication tool. This is promoted by leading worker agencies such as the ILO (Belanger, 2007).

All the unions surveyed in this thesis have web page addresses and all have links within those sites into education, learning or training opportunities for

members. Further, they provide internet links to events such as union conferences, alongside wider civil society organisations and their programmes of events. Those research respondents who made reference to the internet within their narratives amounted to approximately one-third in total. They all made general reference or alluded to the potentially “vast reach of the internet” (Simon) and two research respondents made explicit reference to Skype as a communication medium for offering solidaristic support to trade unionists across the globe. These comments clearly echoed Ward and Lusoli’s (2003) view of the potential power of global networking for workers and unions.

For Klaus, the internet makes communicating very easy and what he refers to as keyboard activism does for him have an impact. Nevertheless, despite the potential advantages of the internet, discussion with Rohini Hensman reminds us that from an Indian and Sri-Lankan perspective access to the internet for grassroots workers can be very difficult and when allied to possible literacy difficulties significant challenges remain. Whilst not having access to the internet may present difficulties for workers and unions, equally having widespread access to digital communication can bring its own challenges. Although not articulated within respondent narratives, digital internet communication can influence power structures and democratic systems within union decision making structures (Shelley and Calverley, 2007) whilst also shaping identities and roles amongst members (Martinez Lucio and Walker, 2008).

Finally we must just note here that Simon and others completed TUC internet provided courses that included not only study materials but an expectation of internet research amongst students. Where this type of course is positioned along the formal, informal and incidental learning spectrum is of course open to deeper debate beyond this thesis, suffice to say its thematic import clearly emerges within narrative accounts.

In terms of trade union members’ interest in utilising the internet as a means of communication a PCS survey (2008) indicates that virtually two-thirds of

their members who offered an online survey response kept themselves informed of PCS activities via the website. Perhaps understandably, this fell to nearly one-third who responded to the survey by post. With regard to everyday internet availability (questioned only in the postal survey), either at home or in the workplace, up to 68% of respondents had regular daily accessibility. Occasional usage was up to 86%, with only very few respondents having very limited access issues. So despite high levels of usage by those who are internet users and high levels of accessibility across the board, amongst PCS members who responded to the postal survey over two-thirds didn't use the website to gain information relating to union events and activities.

The PCS union view this as an opportunity to improve the members' awareness of internet opportunities available to them. Additionally, only some 7% view their website international pages at least once a week, although one-third visit the pages once a month. Amongst an array of possible variables relating to this particular data the PCS union analysis indicates their awareness of the need for a more regular updating of information on the international pages, as well as a more user-friendly design of the homepage. In response to the question relating to which section of the international web pages respondents found most interesting, answers favoured were those of 'industrial and political' (54%), followed by 'education and development' (48%), with third in order being 'international solidarity' (38%) and lastly, with only 15% primarily interested in 'affiliated organisations'.

#### **7.4. Civil Society Engagement: a diverse mix**

It is of political interest, albeit not statistically robust, whether the limited interest shown by PCS members (2008) in relation to affiliated organisations such as the Palestine Solidarity Campaign is reflected in respondents narratives presented in this thesis. If this is the case then it must hold consequences for trade union members learning informally about civil society organisations as well as learning through partnership with civil society

organisations. When Cuba Solidarity Campaign is removed from the equation, due to being directly operationalised through interview questions, those organisations that come to the fore in discussion are not dominated by such commonly affiliated bodies. Rather a diverse mix of civil society organisations and campaigns are cited. War on Want and Amnesty International feature most prominently in terms of high profile organisations, with the remainder being constituted of organisations such as Banana-Link, Fair-trade Foundation, and Venezuela Solidarity Campaign.

In terms of individual campaigns Playfair is twice mentioned and Jeans for Bags is discussed. VSO and Unicef are mentioned by some, as are historical organisations such as Solidarnosc, Weston Spirit and Live Aid. Perhaps lesser known civil society agents include the London Irish Women's Centre, Barefoot Lawyers and the Haldane Society of Socialist Lawyers. As no more than a snapshot, the range of agencies, campaigns and labour organisations referenced within personal narratives is illuminating. The question of whether trade union affiliations are primarily initiated and ratified by political interests and influences originating from senior levels over and above the interests of grassroots members must be asked.

It must be of note that in the PCS survey the international issues of 'most importance' to grassroots members are those relating to public health and education services, alongside child labour and trafficking, issues arguably with more immediacy for families and feelings of injustice. Solidarity campaigns are identified by respondents as being of significantly lesser importance. These issues are closely followed in 'importance' by human rights and the international arms trade, in both the online and postal surveys. Civil society organisations 'actively supported' by grassroots members reflect this with Amnesty International and Oxfam statistically most prominent, with the Fair Trade Foundation following. Again, Cuba, Venezuela, Nicaragua and Palestine solidarity organisations attract much less attention from members. The exact spaces into which trade union members are attracted and from which they accumulate their informal or incidental learning about civil society

organisations is of significance in regard to both union strategic approaches and individuals learning pathways into active global solidarity engagement.

Finally, we come back full circle back to formal learning as those involved in this thesis research also identify all forms of learning, confidence building and subsequent empowerment, in both others as well as themselves, as a continuing journey as opposed to a one-off, episodic event. For Susan this involves a progressive route for learners from informal learning to more formal, with an end goal of gaining a qualification, as “once you’ve got the informal out of the way there’s got to be a formal as the next stage, other wise it just falls flat, you know, it’s a progression route, get informal, get people interested,.....get a qualification”.

It would appear from the findings within this section that three predominant themes emerge in relation to informal learning within trade unions, including learning for solidarity. Amongst these the role of the ULR presents as significant in creating spaces into which union members can meaningfully take their informal lifewide learning, gain access to formal learning, then translate this into further union activism. As such, the narratives captured here complement the findings of Moore (2011) and Ross et al (2012). Where that pathway is walked by workers, further political awareness and worker solidarity is engaged in by individuals as they grow in experience, knowledge, skills, and most importantly, confidence, clearly revealed in these narratives as aspects of personal agency. Further, as personal accounts, ULR narratives encompass an awareness and engagement with union organising agendas and values. Nonetheless, challenges surrounding parochial attitudes, lack of awareness of global worker issues, all alongside worker indifference, remain. In view of this challenge, there may be emerging evidence that the content of the ULR role can, does and should, further embrace aspects of organic intellectual or ‘movement imagineer’ positions. The extent of this understanding and everyday practical application is determined by the dynamism of the individual ULR and any collective union vision to create varied spaces in which notions of ideological and hegemonic awareness through learning can flourish.

Themes relating to the usefulness of labour conferences, websites and the internet clearly surface within narratives as spaces for informal learning. Labour and trade union conferences emerge from these findings as very useful sites of exploration for workers, sites at which worker, union and wider societal issues converge. Learning gained at such sites can be cascaded relatively easily back into the workplace for the benefit of a wider audience. Informal learning regarding issues pertinent to community unionism can also naturally flourish at such sites. Informal learning via the internet may however be more of a mixed blessing. Issues of grassroots worker engagement with union internet websites surface and some of these could be due to issues of content control being dominated centrally by unions. In global terms, despite the vast reach of the internet, at some point the barriers of language and financial resources emerge and these limit its usage.

Encouragingly for trade unions, within our understanding of a spectrum of lived experiences of solidarity ranging from an affective response through to supportive communication, taken further by others via pro-active, dynamic, material involvement, we can identify clear forms of active engagement. Learning is a hegemonic process and as such individual learners come to find their place within that process to differing extents and at different points in time. This results in continuing experiences of empowerment. Additionally, narratives found here reflect a keen sense of identity, interests, injustice, attribution and in some cases an adoption of leadership roles. All, it would appear, are positioned on a pathway towards solidaristic activism with fellow workers around the world, albeit the personal world-wide perspective may come into view someway further into any personal journey. As such, any findings must be located within the wider context of ongoing, evolving, learning journeys and not just in episodic snapshots, but rather in transformative lifewide, and perhaps lifelong, worker experiences.

## Chapter Eight: Study Visits and Solidarity

Trade union organised study visits to other countries potentially represent a valuable area of membership transformative learning through experience, which may include an integral element of solidarity formation. Although falling within understandings of informal learning as discussed above, their distinctive nature and possible impact upon participants warrants a separate examination within this thesis. Again, in terms of reflective and reflexive awareness, it is noted that the author undertook the GFTU *International Development Champions* course which included a visit to Egypt, and had previously visited Palestine and Nicaragua through organised solidarity study visits. This is to be born in mind as we explore the place of visits within any overall union strategic approach to member development and worker solidarity building. Overseas visits are not however unproblematic and hopefully the thematic analysis within this section, conducted through the lenses of individual agency and hegemonic encounters within learning journeys, will shed light upon key areas of contestation.

For Linda, the impact of her study tour was immediate. Her visit to Cuba was not only inspiring, it was laden with meaning in relation to injustice, oppression, shared values and a sense of solidarity with fellow workers from the other side of the globe.

“The camp we stayed in was an international camp, so there was trade unionists from quite a few countries in South America, Australia, Africa, .....Europe, South Korea, and talking to them about their experience was really interesting, particularly the Nigerians and South Koreans, because they are not even allowed to be in a trade union. They had a few campaigns going which were about various injustices that happened, which we just couldn't imagine in this country, how oppressed they are really, how difficult it is to speak for unions. ...that was probably one of the best things about the trip actually, it was just so interesting to talk to people....., and it was quite uplifting as well..... they had the same values as we had, it was just clear that we were all working to the same values as them, from the other side of the world, that sense of solidarity”.

Whilst motivating for Linda, her overseas visit experience was also informed by her personal values coming face-to-face with the stark realities of inequality, violence, poverty and union abuses in other countries. This she shared with her fellow union travellers as the narrative findings indicate within this chapter.

### **8.1. Useful Knowledge: a two-way exchange of ideas**

Some of the perhaps more anticipated themes emanating from the findings would include those of overseas visit participants engaging in an exchange of ideas during and after their travels. When comparing teaching practice in India with that of England for example, teacher Liza recalled in her narrative how the learning environments varied considerably between the two countries. In India “it tends to be a much more sparse environment, there’s not a great deal of children’s work on the walls and things like that. They have taken that on board and it’s a much more lively environment. So it’s been a very good two-way exchange of ideas”. For Liza the exchanges in professional thinking and work based practice were potent for both involved parties and would seem to sit comfortably within Martin’s understanding of mutual learning as being “learning from and alongside each other in ways that are beneficial to both, but not necessarily the same” (2008:64), and are predicated upon practices of discussion, reflection and negotiation. It is significant that the whole event is seen by respondents as a two way process, particularly as we evidenced earlier in the findings that this may not always be the case.

To understand this we have to turn to colleagues within the educational research disciplines for in-depth empirical data, some of which indicates that acquired knowledge from and representation of differing cultures can travel more in one direction than the other, that is towards the less economically powerful constituent part. Martin and Wyness (2013) for example remind us of the paternalistic attitudes that can follow from exchange visits, buttressing already extant stereotypical thinking within participants as unequal power dynamics within partnership arrangement prevail. For Martin and Wyness

much of this misunderstanding is fostered and underpinned by an all pervasive neo-liberal policy discourse within education, some of which can appear imperialistic in nature. Consequently, all understandings of inter-cultural exchange can only be fully grasped through the use of post-colonial theories (Fiedler, 2007; Martin and Griffiths, 2012).

One respondent, Jane, spoke of the value of knowledge exchange and how this fostered a shift in thinking upon return to the UK. She felt that after her visit to South Africa “it really solidified I think the change in the way I was thinking because it was just such an experience and something I had never been through before and I’d never been anywhere like that before so it did stay with me. I think I bring a lot of that to the work I do now”. For Jane the originality and exceptional nature of the experience was very powerful and suggestive of supporting a process of conversion within her world view, some of which she carried over into her everyday employment and trade union activity. Examples she offered within her narrative included promoting Fair Trade chocolate at work and in her union Branch. This was undertaken not only as a solidaristic activity on her behalf but also as a way to encourage colleagues to think about the human cost of food production and the supply chain issues involved.

## **8.2. Immediate Experience: the real thing**

Whilst the exchange of ideas, professional practice skills and knowledge acquisition, leading to a cognitive shift is clearly apparent within narratives, it is the extreme experiences of violence and poverty that appear to present the greatest challenges to overseas visit participants. These thematically significant issues abruptly challenge the previous assumptions amongst visiting union activists. For James, upon his return from the social and political turbulence of Colombia, this was certainly the case as he felt that the experience would “stay with me very powerfully,.....for many years. I say life changing in the sense that whilst you know something in your head, when you visit and experience it, it goes deeply into your heart.....you become a

witness.....a lot of us were challenged by the experience”. James’ comments are positioned within the wider context of his being an experienced trade unionist who had many years awareness of transnational labour issues.

Much of the experience of being challenged undoubtedly comes from the immediacy of the situation into which visitors are thrust, “because it makes it much more real, all of a sudden this vague idea of a school we are linked with in India is actually a real school, with real people in it and when you go over there and you see what it’s actually really like for them then you get a real idea of things” (Liza). The extremes of physical, emotional and cognitive ‘realness’ certainly lend themselves to transformative questioning as individuals are placed in situations to which they need to make sense of somewhat bewildering experiences. Again, for James, these questions were very powerful and all pervasive, as;

“you ask yourself, ‘what would I do if I was faced with that situation’?.. ...these are powerful questions.....and they’re important questions because actually we don’t know the answer to that, who knows what other colleagues would do, and the fact is that we take inspiration from their example to us so although we are providing that support we are taking something from what we see. It helps you to appreciate what we’ve got and also makes you realise how important it is to fight and keep hold of rights that we have as trade unionists in terms of freedoms, employment and human rights, all so hard to win. So I think that was one of the most helpful lessons that I took away from it”.

For James, the view from the Majority World was somewhat different to any contemporary UK perspective he had ever experienced. His visit to Colombia had an understandably profound and lasting effect upon him. Captured at a trade union conference fringe meeting, his personal learning experiences resulting from his overseas visit were shaped by the violent realities faced by Colombian union members and workers on a daily basis. For both James and Linda a sense of better appreciating the social rights and freedoms of trade unionists in Europe, as compared to other less privileged countries, came to the fore in a profound manner and echo the narratives of others. Within narratives this appears to frequently sit adjacent to the solidaristic act of

simply speaking in person with others and thus entering into their experience of being witnesses to unjust events. As with other research respondents, this was for James simultaneously humbling and highly motivational.

Similar experiences were gained by Linda who reflected upon her learning journey on her return to the UK. Linda, as with other respondents, holds the view that “we are very sheltered here and don’t appreciate how difficult things are for people and how prepared they are to really lose their life or go to gaol, .....putting your head above the parapet can be a dangerous thing in these countries. It’s interesting, it seems to be something that a lot of people are prepared to do”. Linda also found her visit to Cuba “amazing” in an inspirational way and was similarly intrigued by “what people are willing to do to make things better”. Additionally she expressed an important and pragmatic reciprocal aspect to her meeting with several Korean trade unionists whilst there, as “it felt really useful” to offer support and encouragement to others. The feelings of usefulness were translated into solidaristic activities by Linda, as we shall see below.

Alongside the witnessing of protest and violence as somewhat frequent events, visit participants additionally expressed feelings of being affected by the poverty that they saw. In Rad’s case it was not only seen, but fully and practically lived as “the facilities there were basic, very basic, and it almost got to the stage where you would dread having to wake up in the morning because you would think ‘oh no, I have to go and use those facilities’, it was awful”. Although Rad’s visit accommodation may have been more rudimentary than that of others, she was not alone in this experience resulting in reflection and self examination.

### **8.3. Political Awareness: fighting for your rights**

It is perhaps the extremes of experiencing violence and poverty that leads individuals into a greater awareness of political situations. Whilst Liza’s comments below raise questions about the extent to which individuals or

groups prepare for their visits, as she found events in India “quite surprising really as I hadn’t anticipated any of that,.... I thought of India as a kind of laid-back sort of place, really quite chilled-out”, she also took the theme of violence and union activism in other countries into an explicitly political dimension. She found that “actually, people were very political and really quite passionate about it as they had to go out and fight for their rights and fight for their beliefs, and to the point of death”. When she arrived in India “there was a lot of unrest going on.....and a lot of local people just really doing very frequent protests in the streets and lobbying government and, you know, just being really very active”. The extent and depth of the political passion and commitment shown by those she met made an impression upon Liza as “the locals were very active and had strong feelings about things”.

Liza recalled how her female host, a Headteacher, who “was very on top of all the political situation, and would tell us at great length all about it. She knew all of the political sides of it all”. Liza did add however that in her experience “I don’t know, I got the impression that it was more of a male thing to become involved in that sort of thing really.... it’s probably mainly a male preserve I would say”, alluding to aspects of possible male hegemony within union leaderships. Nevertheless, the degree of agency demonstrated by her hosts was illuminating for Liza. If the pitfall can be avoided of placing visit participants in such extreme situations, as it can deflect them from the original objectives of their learning, then these findings would appear to concur with notions of transformative learning. This learning for Hutchinson and Rea “involves deep, powerful emotions or beliefs...(and)...induces far greater change in the learner that other kinds of learning, which shape the learner and produce a significant effect or impact” (2011:553).

On return from Cuba, Rad reflected upon the fact that “I wasn’t that much into the politics of other countries at all,.....but since the trip it sort of opened my mind a bit more and made me more interested in other current affairs going on in the world”. Interestingly Rad, with several others, initiated her narrative account with such phrases as “I wouldn’t say I’m a die-hard union member, ....whose world would revolve around the union”, and followed this

expression of self-perception with indications of an emergent political awareness and union engagement as her story unfolded. Further to this Rad related her newly acquired political interests and sense of personal agency to the current privatisation agenda of the incumbent UK coalition government. To her “it seems like if anything the whole (public) service is going to be dismantled, but then the trip to Cuba made me realise that people will keep on fighting to the very end so we should all plan to do the same, even if it looks like we are going to be fighting a losing battle we should all still fight to the end”.

In identifying possible emergent interests in the political situations of other countries, stemming perhaps from experiences of violence and poverty, what is of significant thematic note within the findings is the complete lack of narrative references from visit participants to notions of class. Perhaps Linda came closest when discussing her interest in Cuban socialism and “how a planned economy works, ‘cus I mean there’s so few in the world and that is probably the most pure, you know, the most pure socialist model..... something that trade unions hold up and defend and it’s interesting to see how it works in practice really”. In discussing how the model worked, Linda was “a bit shocked at the differentials of peoples’ living standards”, associating this comment subsequently with her feminist interests and concluding, “but it did seem to be something about equality and the women’s movement did seem to have a lot of power and seemed to be a massive political force”. Despite the diversity of countries touched upon within this section, Linda’s comments on the workings of a socialist model was as near as any visit participant came to the language of class, socialism or neo-liberalism.

#### **8.4. Getting Active: an exercise in creativity**

In light of the somewhat disorientating dimension of witnessing violence and poverty at first hand and seeing the extent to which workers in other countries have to apply themselves to fighting for social and employment rights, it

appears from the research that overseas visits spur UK workers into getting more active themselves upon return. More active in the sense of extending their own experiential boundaries but also in exercising greater creativity in their action. For Linda this meant extending her experiences into activities she had never previously engaged in as she was “asked to do a little write-up since”, in her employer’s work based magazine, “and it’s now a word (solidarity) that has to go in there.....I am definitely interested in their situation and you know, finding out a bit more about those countries”. Linda’s undertaking of an activity that she would not have previously done is driven in part by feelings of “responsibility, to promote the Cuban side really, so that would be something that I’ve taken from it. They (the union) joined us up with Cuba Solidarity (Campaign) as part of the trip so we’ve got a years subscription, so I’ll renew that again”. In Bini’s case she wanted to “recycle loads of books,.....unused books,.....I’m going to ship then to anybody, you know, anybody in Sri-Lanka, Nepal, or Bangladesh or wherever”.

On return from a visit to South Africa Jane was more than happy to offer talks and presentations to her work and union colleagues, an example being when “one of the managers asked me to do a display about it and people asked some questions”. A common practice amongst returning visit participants perhaps, but one that highlights how worker awareness can be raised. Colleagues had an “unawareness of what the situation might be and what they’d seen on TV or things like that and I don’t think they’d pictured South Africa,....being very modern. They kind of had this idea of the shanty towns and some of the townships and so on but not really of anything beyond that”. Addressing stereotypical thinking and having to respond back in the UK to significant levels of lack of insight into Majority World issues proved a challenge for Jane.

Beyond the obvious activity of giving talks and presentations upon return, more innovative practices also emerge. In Liza’s case she attempted to make a joint cook book, and “we will sell that.....and it will become an exercise in showing what can be grown in different countries”. Liza’s comments certainly demonstrate people’s creative capacity to adapt experiences and newly

acquired ideas to their immediate context, either within or outside of the trade union environment.

As indicated in the previous section, for Jane any change in behaviour upon gaining new experience and knowledge was allied to her strong ethical sense. She recalled,

“we went to South Africa in the September so by November Christmas stuff was beginning to appear in the shops and I remember walking round and I just thought how excessive it was .....you know, it felt like a real kind of consumption and I just thought I don't see the appeal in this anymore .....I don't know where it's come from and it seems excessive and I don't want to do that”.

Jane's ethical disorientation and subsequent self examination, leading to her more morally activated stance, certainly touches not only on issues relating to extremes in wealth between South Africa and the UK, but also upon the issue of UK consumption fuelling the production of goods, with its inherent employment provision for Majority World workers. Her comments also allude to what is often referred to as 'consumer power' and how and where UK citizens choose to spend their disposable income, an issue that few other narratives touched upon.

The full extent to which Jane and others adapted their thinking and behaviour over time is of course open to discussion and possible further research. The findings here could however suggest the beginning of a re-positioning of identities, a process that most of the empirical findings and subsequent literature report upon (Hutchinson and Rea, 2011; Martin, 2008; Martin and Griffiths, 2012) as individuals adjust their understandings of self to that of others. This for Andreotti (2007) is an essential ingredient within mutual learning processes as we need to 'un-learn', listen, reach-out to others and learn to learn anew if mutuality is to be fully achieved. This can only occur however within an inter-cultural space negotiated between any parties involved in any learning process (Martin, 2012; Fiedler, 2007). Additionally, findings here are indicative of visit participants' discomfort with their experiential encounters and Brock et al's displacement spaces that “we move

into (either by force or by choice) whereby we see things differently” (2006: 38) appear to be apparent within these findings and akin to Mezirow’s (2000) transformative phases of disorientation and self-examination.

Whilst overseas visits can be a life changing experience for those able to participate in them, the opportunity to do so can be limited as those in trade union positions of power and influence can appear to dominate proceedings. For some research participants places on visits “seem to be always taken by the general secretaries or officers, so there’s never any chance to get on them. They say that rank-and-file members should get the opportunity to go on visits but it never happens” (Charles). A fairly common disillusioned view perhaps and yet one that raises issues of equality of opportunity that most unions claim to embrace. The lack of opportunity for grassroots members to participate in such visits finds an echo in the wider experience of the author, although in the case of the GFTU *International Development Champions* course grassroots members were specifically targeted for overseas visits to South Africa and Egypt.

### **8.5. A Reciprocal Process: working on an equal basis**

Overseas visits are of course in many ways a two way process and UK based research participants were keen to demonstrate notions of equity, equality and reciprocity, with Liza summing-up the comments of several when she spoke of discovering what “we can usefully do together, and for them to come over to us helps us see how it can be a shared partnership..... to share activities and help each other on quite an equal basis”. Ideas of sharing, partnerships, togetherness, were sprinkled through several testimonies, demonstrating perhaps not only trade union diversity awareness in the UK but also the sensitivities surrounding international worker solidarities.

The advantages of Majority World workers coming to the UK within this reciprocal process were also highlighted. Rohini Hensman spoke of when

after the Bhopal disaster, she helped organise a tour to England for some of the survivors. She contacted local groups in the UK and the Bhopal survivors came and spoke about their situation and exchanged their experiences with those campaigning in the UK against hazardous processes in general. This provided an immediate and “strong sense of identification. These were not just ‘poor third world people’, who are victims,.....they are actively fighting for their rights, they are struggling against huge global corporations and they’re talking about.....a goal that is common, so that immediately provided a link that is very strong”.

Expressions of solidarity, common experience and of agency surface here and could appear as having a similar transformative impact on the UK workers in question as actually travelling overseas themselves. Rohini also made reference to travelling overseas to attend labour and trade union conferences. In utilising the example of her participation with Women Working Worldwide she emphasised the value in her experience of these events as “activists from different countries came together and that was especially positive because it was women. I think that’s a very important way of establishing contacts and solidarity”. The realities of overcoming the practical hurdles also surfaced within her discussion, as “the problem is of course is it is quite expensive”. In addition to issues of cost, the second hurdle is that of communication. For Rohini, short of face-to-face contact, one powerful approach is to utilise certain forms of media, as “films I think could be one way of establishing contacts, they could provide a useful way of putting workers in touch with the struggles elsewhere or the conditions elsewhere”.

Trade union Branch ‘twinning’ was mentioned by Carrie and Klaus as a method of nationally different union Branches keeping in touch, sharing video making, building relationships and possibly engaging in reciprocal visits, with Carrie emphasising the solidaristic value of visiting speakers being utilised at international learning events. Martin and Griffiths (2012) would concur with the approach of better integrating overseas visits far more closely within formal educational courses and international practice placements programmes, as opposed to one-off, isolated events. In the author’s

experience on the GFTU *International Development Champions* course visit to Egypt, outside of the subsequent project conference little follow-up support was offered to visit participants upon return to the UK. Any further personal learning and development was thus instigated by participants themselves.

Finally it is of note that within the findings some narratives, particularly those originating from Colombia, spoke of visits to the UK a protective measure against harm. For labour and justice activist Amelia, longer term “respite from the persecution that they (trade union activists) face in Colombia” is a key ingredient within union visits to the UK. Longer term funded programmes would afford union members the opportunity to not have to leave their home country on a permanent basis. Additionally this would allow them the chance to learn English, hopefully at an affordable rate at a university or college in the UK, and have somewhere to stay for a period of months. This would give visit participants sufficient “space, and to help build the campaigns over here....but what’s really needed is some kind of respite, because at the moment there are a lot of colleagues in Colombia who are under threat from paramilitaries”. Although the resource implications of such a visit programme are obviously extensive, from a Majority World perspective they are requisite for any in-depth mutual learning to take place.

From the research findings, the inference can be drawn that in terms of transformative learning experiences the immediacy of trade union overseas study visits appears unequalled. The impact upon participants reflects Mezirow’s (2000) initial transitional phases of disorientation and dilemma, leading to self examination and critical assessment of previously held assumptions. The centrality of experience appears based upon shared values and to some extent a shared discourse between visitors and hosts. When the barriers of language and lack of resources can be overcome, the transformative experience seems to translate into creative, dynamic, agential activity upon return. The powerful influence of this learning experience, if combined with related formal learning prior and post visit, presents itself as the optimum learning provision.

## Chapter Nine: Discussion and Conclusion

Neo-liberal discourse regarding the virtues of free market principles, including free trade and privatisation allied to notions of personal freedom, liberty and responsibility, it can be argued, has overshadowed the UK political, labour and trade union landscape for over thirty years. This ideology has additionally surfaced in much of the rest of the globe as an integral aspect of the process of contemporary globalisation. The impact of the neo-liberal globalisation process has exposed the limitations of labour and union power. Consequently, in the light of profound changes in the world of UK workers, alongside union decline, unions have been compelled to respond through new and at times innovative ways of organising their members, activating their members and seeking new members to swell their ranks.

The process of globalisation has also required trade unions to consider transnational and global worker solidarity issues to a greater degree than hitherto due to increased transnational production and supply chains. Although much of the union and government supported learning response has revolved around skills acquisition, it has also become necessary for unions to employ pedagogical techniques and learning spaces that offer more globally orientated counter-hegemonic learning and personal development opportunities in order to raise awareness of globalisation issues detrimental to workers. Whilst UK unions have historically involved themselves in transnational solidaristic relationships, often utilising learning initiatives to do so, some documentary data analysed here suggests that due to the current era of accelerated globalisation the informing and actualisation of grassroots members with regard to demonstrating transnational solidarities has become greater than ever before.

This thesis has attempted to posit and subsequently offer insight into the questions of why, how and to what effect UK trade unions provide learning opportunities that foster global solidarities awareness, understanding, and activism. It has also sought to establish whether unions are providing

sufficient learning opportunities in relation to global issues that affect members. In examining these issues we have questioned the transformative nature of union learning and development processes and how effectively these are supported in the eyes of learners by union adopted pedagogical approaches. Our analysis of the research findings is informed by a thematic approach that examines all the accumulated data, including examination of the explicit and implicit content within the data in an attempt to seek a patterned response.

To assist with analysis of the findings we have utilised aspects of complementary theories and understandings of mobilisation, learning and solidarities that all attempt to situate and offer some context to any transformative process occurring within individuals who journey into solidarity awareness, understanding and actualisation. Embedded within any journey into activism through learning the issues of personal agency and meaning-making in the face of cultural hegemony surface and require attention. The remaining discussion now relates to what has beneficially emerged from the research findings that can assist us in addressing the research questions. Answers that can be found in documentary data that offers insights into course content and informal learning provision, alongside that relating to union pedagogy. We finish by examining the singular power of the research narrative voices.

### **9.1. Supported journeys into solidarity**

Within the wider context of globalisation we now continue to locate and examine the findings relating to the formal course content offered by unions within structured curricula. This pulls together aspect of the documentary data and places it alongside narrative findings as we conclude our examination of how potentially activating are the counter-hegemonic knowledge development opportunities offered by UK unions. This includes the influence they have upon member experiences of forging global worker solidarities. Essentially, within all developmental opportunities, what learning event subject matter do

unions believe is supportive of the actualisation and activation of union members? Further, how does this equate with learner expressions of self-actualisation into differing solidarities as both learner and learning provider presumably seek to travel towards a mutually beneficial final destination. Within this analysis is placed some broad categorisation of courses based on Johns' (1998) taxonomic understanding.

From documentary data relating to formal course content one dominant finding emerges, namely that of the apparent importance for trade unions of developing organising systems and structures. This issue of union structural and membership organising sits firmly embedded within curricula, as evidence within these findings. This suggests that for unions, organising is as important within the transnational context of neo-liberal globalisation as it is on a local, regional or national scale. With narrative account data this sits adjacent to issues of injustice as one of the two primary research findings. This dominant organising theme includes such closely associated practices as Branch level organising, youth involvement, bargaining, community organising and activist skills development. Whether implicitly embedded within course content or explicitly expressed during learning journey narrative accounts, this finding can be seen to represent the central learning objectives and apparent strategic, planned learning outcomes of the courses studied here. Assuming these are the primary intended outcomes then union learning is succeeding in its aims, with the former outcome being, as we have seen, the single most motivating factor for member mobilisation. Should these two dominant findings not be the planned outcome then union learning it would appear is providing unintended results.

When allied to the findings referring to trade union campaigning, then union organising as subject matter is clearly the most prominent outcome. Of note within the overall organising theme was that of community organising, that is building links with local communities and their independent civil society organisations. This research outcome formed a significant finding in itself. For proponents of the development of community unionism this subject area is presumably of significance and presents here as a key element within overall

strategic union planning around organising through learning provision. It is of note though, that union affiliations with an overtly political agenda do not necessarily appeal to all union members. Many members are attracted to civil society affiliations or partnerships that relate more to their immediate social, domestic or family situation.

The significance of the two dominant findings of trade union organising and issues of injustice would seem to give weight to the view that the requirement for successful union solidarities engagement is to place organising, including at a global scale, prominently within all that they do. This includes our focus here, through the medium of learning and wider personal development. Union and individual member values and belief systems around notions of injustice are additionally positioned at the forefront of all they undertake. An assumption here amongst union learning providers is of course that attendees want to learn about worker and union organisation, something that is perhaps not always the case with individual members.

Trade unions it would seem feel impelled to embed organising within the learning provision, be it explicitly or implicitly, due perhaps to continual pressure to defend, strengthen and expand their positions at a local, regional, national and global level. Unions have traditionally chosen to organise through learning provision and build their structures at local, regional and national levels, with one consequence of globalisation being that this requires greater resource allocation targeted at transnational issues and activity levels. The traditional 'swords of justice' approach by unions appears also to be taken further to the transnational level as they attempt to up-scale their learning organising activities to defend and advance their collective cause. When the two primary thematic findings of the research are placed within conceptual understandings of what drives individuals towards activism, partly through learning opportunities, culminating in some form of solidarity with other workers around the globe, we can begin to glimpse the reasons behind why and how unions attempt to provide transformative learning opportunities for their members. The contemporary phase of neo-liberal globalisation has

forced unions to re-evaluate and redesign their approach to matters of transnational interactivity, including solidarities formation.

The narrative research evidence suggests that individual trade union members themselves experience global influences, including the opportunities for active solidarities with other workers around the globe, more directly and immediately than in previous eras, particularly through internet communication. This experience may also occur through issues such as the outsourcing of work to other parts of the world. The opportunity for UK union members to travel more widely may also have enhanced this experience. Presumably union learning providers recognise that their members are receptive to learning about these subject matters and can thus be attracted, informed and potentially empowered through the study of these primary areas. It would appear from findings that union members bring their own experiences and understandings to the collective learning table and this in itself is an impulse that can be further mobilised. Synergies between shared interests, common causes, collective identity formation, group learning strategies and entering into solidarities with others as a transformative process, have certainly been identified within this research.

It could be argued that all findings actually spiral from learning about injustice and about worker organising, the two central characteristics of trade union learning provision found here. Aside from the frequent presenting issue of globalisation, the ubiquitous theme of internet use, and the somewhat operationalised theme of solidarity within the research, findings sitting adjacent to organising in documentary data include, global economics, the international labour movement, international development and a collection of matters clustered under the category of 'diversity and inclusivity'. These include union affirmative action and analysis in relation to worker migration, Black member inclusion, and women's engagement.

Within course curricula issues of global economics and trade focussed upon matters of TNCs operating within global free market principles, transnational capital finance and trade justice. This may indicate the extent to which neo-

liberal reforms have impacted upon global labour markets and the urgency that trade unions place upon challenging through member learning the current context in which labour finds itself. Learning about the expansion of trade and addressing issues of trade justice also come thematically to the fore here as learners are encouraged to explore employment and trade situations within the sector in which they find themselves. Whilst more immediate and pressing for some sectors than others, this thematically strong thread offers the opportunity for unions to build solidarities across several sectors.

Learning about global financial matters and global trade dovetails thematically with learning about international development and this issue comes through powerfully within the documentary data especially, appearing somewhat more implicitly within narrative accounts. The theme ties in closely with member interests in poverty and injustice whilst also allowing for feelings of solidarity to emerge and for trade unions to achieve some degree of renewal. Alongside the study of poverty, exploration of the Millennium Development Goals (MDG's) is apparent, as is the issue of UK government aid. Opportunities for labour organising enter into any union strategic planning here as organising for renewal and organising for development share a high degree of synthesis and even synergy. This certainly appears as a win-win situation for workers, unions and local communities.

Allied to expressions of interest through learning in relation to international development is the theme of the international trade union movement. Language and learning however in relation to this revolves extensively around issues of crisis, renewal and regeneration. Expressed notions of crisis and renewal relate in turn to broadening the membership base of unions and clustered under ideas of diversity and inclusivity this theme is evident. It is associated with increasing the active participation and membership density of, for example, women workers as members and active trade unionists, migrant workers and ethnic minority workers. Advancing the positions of such groups through learning would appear an integral part of overall union strategic planning designed to appeal to all workers, appealing as it may to the diversity of the UK workforce as well as democratic values of unions.

Findings of lesser import within course curricula include examination of the global environment and of energy democracy issues, the history of trade unionism, the role of the media, and state imperialism around the world. Whilst not extensive thematically, world climate study is an area of membership learning that may emerge more extensively in the future as it becomes of growing relevance not only to union members as individual citizens, but also through labour and industry related concerns. This remains an area open to further research. Themes relating to union history and the role of the media are perhaps more established within union counter-hegemonic learning spaces as they provide subject material freighted with ideas of mutual concern, meaning making and identity formation, potentially leading to collective bonding.

It is in this section that examines documentary data surrounding course content related themes that we must attempt to position our courses under study within Johns' (1998) taxonomy. This ranks expressions of solidarity and their ideological foundations on a scale ranging between accommodatory to transformatory. Where it proves problematic to place UK provided courses examined within this thesis within Johns' framework is when their absence of explicit nationalistic, political and class content is replaced by a strong emphasis upon 'fairness', 'rights' and 'justice'. This is exemplified by such phrases as 'fair trade', 'worker rights' and 'trade justice', placing as it does such strong emphasis upon equity and social justice as key drivers in challenging neo-liberal globalised ideologies and transnational capitalist practices. Johns offers limited scope in which to position the ethical and moral emphasis placed within the UK worker learning programmes studied here, characteristics that this thesis research has identified as thematically powerful. Lastly the findings of this thesis add a further dimension to Johns' work in that they explore the learner perspective and thus take into account the agential, dynamic, innovative nature of learners, including to some extent the timeframe in which it takes individual journeys into active solidarity to grow and develop. This thesis also understands solidarity primarily from as a creative dynamic between individuals, driven by unequal power relations

(Featherstone, 2012), before that of simply emotional bonding and shared interests.

Despite some differences of methodology what remains of note within documentary data collected here is the virtual absence of overt declarations of political orientation by course providers. In addition to this student examination or even expressions of class identity also remain highly elusive. With the exception of the GLI *International Summer School* and the GFTU *International Solidarity* course, class and political identity appears to surface little. An exploration of socialist practices and application was obviously evident within the Napo *Next Generation* course as it included a visit to Cuba, albeit examinations of socialism appear to have been driven more by individual course attendees rather than course organisers per-se. Nevertheless, despite reservations found within the complexities of the learning environment, these courses can be seen to contain aspects of Johns' highest level of transnational solidarity, that is Level 3 at which underpinning beliefs and political expressions lean towards confronting capitalist production systems and promote overt transnational class consciousness.

None of the formal trade union created and provided courses under study within this thesis (See Appendix D) lend themselves to Level Zero of Johns' classifications system as none of the data collected presents as blatantly nationalistic and protectionist in content, being singularly defensive of UK workers in nature. It is also difficult to place any firmly within Level 1 as this category still contains a high degree of protectionism and welcoming of advantageous aspects neo-liberal globalisation, with solidarity being seen as a useful self-serving, exclusive, protective tool. This therefore leaves Level 2 in which to situate our remaining courses. The majority are characteristic of Level 2 in the sense that the geographical and nationalistic position of workers is recognised, yet cross border, transnational worker interests are also identified and seen as shared to various extents. Negative aspects of neo-liberal globalisation can be seen to be confronted within these courses, albeit to varying degrees of overtness. All courses studied contain elements of at least attempting to make learners aware of the need for transnational

solidarity, demonstrated not only within course content but also through signposting learners to further resources. Links are made within courses to international solidarity campaigns and to such organisations as GUFs, the ITUC and IFWEA. Other aspects that place our courses within the Level 2 parameters include an emphasis upon international development and the importance of overcoming poverty within Majority World countries, including taking poverty issues into local communities, publicising issues and forging links with sympathetic civil society agents. From a solely union perspective, encouraging practices such as Branch twinning not only for organising reasons but also for social justice campaigning reasons is indicative of Level 2, as is providing overseas visits as Napo and the GFTU did within this study. As indicated above, a more overt, confrontational, class based approach would place these courses at or over the boundary of Johns' (1998) Level 3 categorisation.

## **9.2. A pedagogy for solidarity**

The importance of learner-centred approaches is a clear pedagogical finding emerging from the research. We have seen how this emerges from within the documentary data. As we have seen that learning can be a complex and messy process, questions addressed here have looked at what teaching methods and/or sites of learning trade unions think are supportive of self-actualisation into different expressions of solidarities.

Within both data sets is the finding that debate and discussion are used as an adult instruction and knowledge generation methodology, chiming as this approach does with ideas of seeing human interaction inclusive of rational discourse as a primary and powerful developmental tool to foster critical thinking. Presumably trade union belief in the efficacy of this process assumes that adults respond well to engagement in this method. It certainly allows space for individual experience, knowledge, understanding and aspirations to be shared and shaped on both an individual and collective basis. Additionally, time provided within formal courses for discussion was

seen as of great value by participants. Discussion and debate additionally allows for the experience of all within a learning space to be included in the collective arena, valued and possibly utilised further. This is an approach that is appreciated within narrative accounts and reflects the literature discourse on transformative or emancipatory learning theory. This suggests that learning for adults is found at its best when it relates to students' direct life experiences as they struggle to make meaning from within their everyday environments.

Significant findings relating to individual research and to signposting of further study by learners were evident within the findings. Creating the opportunity for personal enquiry into areas of interest to individuals echoes adult learning principles relating to self-directed learning through subject choice and self-discovery of knowledge. Within most trade union learning spaces this can at times occur collectively and the results of individual research are usually subsequently shared in a collective forum. The approach of signposting students to further learning opportunities outside of the immediate learning context, for either individual research purposes or through making links to partnership organisations appears as a common and fruitful teaching method. With the exception of one notable piece of data relating to the use of museums, all signposting of further study was channelled through the use of the internet.

In the contemporary 'knowledge age', with the vast array of information accessible through the internet and digital technology, signposting learners to information via the internet is perhaps unsurprising and inevitable. In developing their web-sites trade unions have to some extent, depending on resources, embraced the digital age to spread their message. Although 'keyboard activism' is identified as an integral aspect of contemporary expressions of solidarities, it is also recognised that in Majority World environments accessibility is not universal and any prevailing use of English as a communication medium is a barrier to many.

In contrast to individual research techniques as learning methods, associated predominantly with the internet, traditional methods relating to the more

established approaches of reading books, writing and tutor support were discussed, if lesser in thematic extent. The use of lectures, seminars and conferences as spaces and tools for learning is evidently common practice. With regard to labour and/or trade union conferences, these events offer at times an interface with the stark realities of life in some Majority World countries, as well as promotional opportunities for union members who are unaware of what solidarities their union may be involved in. As a forum for promoting awareness of events in other countries they also offer an interface with other civil society actors within the UK, again perhaps opening doors for members to pass through to explore issues further. Respondents certainly speak of taking knowledge acquisition back to the workplace and cascading it further to colleagues and local communities.

The use of video or film, social events, and work placement experience as learning methodologies also featured in a minority of narratives, as did the value of reflection, review and evaluation of personal learning progress or group discovery. Collectively the less dominant findings offer a multi-dimensional approach to adult learning provision and in terms of the diversity of ways that individuals personally learn, this approach lends weight to the utility of a multi-modal format.

One last outcome from the findings that presents as the most significant for respondents is that of the use of group activities and exercises as a trade union teaching method for solidarity and other learning. This finding emerges somewhat more from the documentary data, before that of narrative data. This thematic cluster includes examples such as activities involving quizzes, group mapping exercises, group planning exercises and word association tasks. The collective nature and value of any groupwork task is clearly apparent and relates directly to shared knowledge creation and acquisition. Implications for not only collective bonding are apparent, but also ideas relating to the creation of 'useful knowledge' as defined by the group. Narratives that did speak of group approaches to learning made reference to the crucial role of the tutor as guide and mentor to both individuals and group cohesion as a whole. Group exercises also allow for union principles of

collective problem solving to be encouraged. Where group approaches to learning either through collective activities, exercises or discussion does appear of less significance is when learning is undertaken on-line, at a distance from any physical, unifying space.

The use of planned study visits or guest speakers with their emphasis upon the value of direct and immediate impact is identified as another regularly employed instructional method. The experiencing of another's work situation and context in a direct personal way has a significant emotional impact that would appear enduring and motivating. This impact appears from the findings as unequalled in extent and influence, leading as it does into challenging, disrupting and disorientating study visit participants into reflective practice. Additionally, participant voices speak of being unable to escape the political dimensions of everyday life that they experience within visits to other countries, dimensions that are freighted with unequal power relations. These include gender inequalities amongst others. For study visits to serve their proper purpose, learning, it is argued, must be seen as a two-way equitable process, one not dominated in any manner by any wealthier union, with formal learning matter being provided pre and post visit. Finally, whilst visits to the UK by Majority World leading trade unionists can in extreme cases provide respite from political violence at home, the predominant practice of UK trade unions invariably sending General Secretaries on visits before rank and file members causes disquiet and discontent in some narrative accounts.

If direct personal experience is not possible then the use of powerful speakers who can offer their knowledge and understanding through attending shared learning spaces is the next best outcome for trade unions, according to the data. The provision of guest speakers at learning events or sites of informal learning is strategic within documentary data and seen to be invariably influential, valuable and memorable through narrative data. Again this pedagogical approach sits firmly within union commitment to the value of individual member experience. This experience is not only an asset in itself, but should be shared in a collective manner.

Findings relating to the pedagogical approaches used by trade union in relation to learning for solidarities can thus be seen to adhere largely to adult learning principles that dovetail closely with union values. Values of unity are supported by any collective approach to learning, as are values surrounding democracy and collective goal setting. Union learners are offered the space for self-motivated, self-directed, problem centred learning that places difficult issues within their everyday experience and context. Some self-reflection is required and all learning is positioned within a wider context of exploring values of equity and equality. Blended approaches to learning provision is seen by research voices as a pragmatic way of overcoming practical barriers to accessing learning events. This approach has been used historically by unions for many years and is evidently identified as being of utility in promoting learning for active global solidarity. This understanding of learning delivery appears to sit within an overall strategic approach to developing global solidarities, whilst simultaneously forming part of any learning pathway that supports learners from an awareness raising level of questioning to that of an advanced critical analysis.

### **9.3. Voices of transformation**

We can most usefully finalise our topic of research enquiry through examining the thematic findings relating to the narrative voices emanating from the interview data. Trade union members and labour activists voices speak to us powerfully about their experience, understanding and application of everyday solidarities. Across all individuals and nationalities represented within the narrative data shared feelings of friendship, empathy, sympathy and meaningful emotional identification occur. Within this, distinct glimpses of female worker identifications were detected as in some cases female worker identities were privileged over all others. The value of union history, tradition and ongoing struggle is evident, positioned alongside expressions of collectiveness, unity and the sense of empowerment that this reciprocal approach offers. In attempting to better understand the voices of workers in learning we continue to draw upon ideas of what mobilises individuals and the

developmental phases they may pass through on any transitional journey into personal change.

To some respondents, themes of collectivity appears sensible, rational and logical in their efforts to make-meaning and personal sense of their social and employment context, offering for them, as Mezirow (2000) suggests, an opportunity to evaluate and contextualise their immediate situations. This sense-making is however more than a passive or affective identification with others, as with Featherstone (2012) its dynamic nature involves reaching-out, often in mutual problem solving scenarios, in what appears an agential, transformative process that combines past, present and planned future experiential development (Emirbayer and Mische, 1998). This process frequently includes solidaristic engagement with other civil society actors and agencies, many of them less directly or explicitly political in nature than some trade union affiliated organisations.

The phenomenon of 'keyboard activism' also emerges as the distant reach and immediate access of the internet is ubiquitous within findings of solidarity. With the internet as an example of space-time compression experienced by most respondents, notions of globalism surface within narratives. Individuals begin through learning to journey into seeing beyond their immediate environment into a global web not only of connectedness in solidaristic communication, but also via uneven power relations within trade, commerce, employment, working conditions, and applications of social justice around the world. Embedded within narrative accounts these experiences led to innovative and creative ideas and expressions of active support for others, driven in large part by an unwillingness to accept inequality and inequity in a world where respect and tolerance continue to present as valued by respondents.

Narrative research findings place the learner experiences of injustice, commonalities amongst learners, and to some extent the development of leaders centrally within trade union learning provision. Although this is supported through assistive pedagogical methods, difficulties clearly remain

that can hinder any transformative learning experience. Narratives indicate that UK worker attitudes of indifference and parochialism continue to exist. Allied to this, activating members to respond to events at the transnational level is challenging. This can be especially so as the call to activism by unions, either through learning or any other route is in the broader context of unions seeking membership renewal and revitalisation. Self-protective attitudes are nevertheless in the minority with the narratives of respondents. Despite this a key challenge for unions would appear to be when, where and how to encourage members to take their first steps into learning, leading hopefully to personal transformation that chooses to adopt a broader vision for trade unionism and global labour engagement.

Some narratives suggest that the value of trade union learning, including learning about issues of globalism, is beyond price. The overwhelming majority of narratives speak of their union learning journeys as highly valuable experiences that open actualising doors in ways they had never previously imagined. As such this suggests that union learning provision needs to be funded to a significant degree if counter-hegemonic learning, the fight for worker rights and the active implementation of social justice is to be applied through learning onto the global stage. Supporting narrative accounts in this view is the fact that learning about global matters, primarily through studying globalisation as a process, is embedded within most union courses examined here, including courses not ostensibly associated with global issues.

Engaging with sister unions around the world, although practically more accessible due to the digital age, appears from narrative findings to be fraught with perceptions of neo-imperialist, post colonial consequences with regard to inter-union power dynamics. This may require UK trade unions to 'un-learn' much of their thinking and practice when interacting with worker organisations around the globe as Martin suggests (2008). This need to un-learn and re-learn paternalistic attitudes could surely be achieved through formal and informal learning events that present a much more shared, informed and equitable perspective with Majority World workers. Whilst appearing very limited in extent in course content and UK narrative accounts within the data it

did surface more frequently within the voices of non-UK based participants, perhaps inevitably given their histories. Although not statistically robust, the import of these Majority World voices surely needs to be taken into account by UK union learning providers if domineering and patronising attitudes and practices are not to emerge within transnational union relationships.

Although it is acknowledged here that some employment sectors lend themselves more naturally to transnational activity, the role of GUFs and the ITUC across all sectors studied are noticeable by their absence within findings. This can only be a cause for concern within trade unions seeking to improve global awareness, understanding and coordinated activism amongst members. Union learning provision it is suggested needs to incorporate greater awareness of global union structures, their historical development, and inherent uneven relational dynamics if deeper solidarities are to be forged, as maintaining absence in learning spaces from issues of disunity will not make the issues disappear.

Allied to concerns of uneven relational dynamics and union renewal remains the issue of gender and minority group participation and representation within union structures and daily activities. Although when clustered these findings present as strongly evidenced within the documentary data, some individual narratives also still speak of disquiet amongst activists and the need for this to be addressed through learning. Furthermore, evidence here relates largely to UK based understandings of these issues, with little data referring to how they impact upon or are creatively addressed by the rest of the globe. This relates especially to the feminisation of work and female worker representation, organising and learning provision around the world. UK voices certainly speak of women needing support in taking their first steps into applying for formal courses and entering formal learning spaces as individuals. Lastly, the practical utility and thus value of remote learning via the internet for certain groups of learners is perhaps in need of deeper research enquiry than can be offered here.

Within the accounts of UK rank and file trade union learners, lecturers from various learning providers and activists involved in learning provision in Majority World countries, the predominant finding to emerge is undoubtedly that relating to perceptions of injustice on a global scale. This theme dominates the narrative findings, providing data that is in itself rich in content and thus compelling in nature. Within individual narrative accounts the voices clearly and explicitly speak of notions of inequality, unfairness, oppression, disadvantage and associated concepts. Notwithstanding our limited interview sample, this emotional and ethical response occurs across the range of interviewees. The passion with which interviewees speak is evident and this theme appears as the *sine qua non* for engaging and activating union members and perhaps workers in general.

Conceptual understandings (Kelly, 1998) that place the role of injustice, identity, interests and attribution of responsibility as key factors influencing transformative journeys into activism assist us in understanding the narrative data within this research. Despite the earlier critique of Kelly, the voices captured here within interviews express and echo agential feelings and personal motivational experiences surrounding injustice and responsibility, characteristic of his position. Learning journeys within the narratives range from those coming new to awareness of transnational issues within trade unionism, such as Rad and Linda, to those with a deeper understanding and actualisation involving global matters, such as Jane and Carrie. The most marked and immediate transformative effect is perhaps seen in those new to this area of learning and undoubtedly by all who undertook overseas visits. Conceptual understandings that place the role of social identity, shared interests and leadership are evidently of utility when excavating both the narrative data and documentary data. As we have seen, accounts of what mobilises individuals are less evident within documentary findings. Nonetheless, those that are evident in narrative data demonstrate a clear progression into identity formation and shared interest the further one is into one's learning and activist journey.

Collective social identities that emerge from narrative accounts locate individuals within the context of a commitment to the advancement of women's social and employment issues, gay rights, supporting the UK trade union movement, the international trade union movement, and/or civil society involvement. Within these broad social categories perhaps lies a more pressing need for unions to address, namely that of some continuing fragmentation around the political identities of members, including those in learning. Whilst some voices speak of clear understandings and applications to, for example, socialist ideas and practices, others are unaware of such identities or appear to intentionally distance themselves from them. This may be due to differing generational perspectives. Embedded within documentary and narrative data nonetheless lies a framework for the building of collective identities and shared interests.

Issues of identity for trade union learning are inextricably linked to the extent of explicit or implicit course content within formal learning programmes or informal learning events. Whilst the findings may indicate that informal learning opportunities at such events as union or labour conferences may be replete with political content, formal courses remain largely free of explicit political or philosophical material. The findings also indicate that the time and space to discuss, agitate or organise for such outcomes is diminishing as intensified work regimes and practices have stifled many traditional union communication methods such as debate, discussion and general collective engagement. The question of whether union renewal, driven in part via learning provision, should be informed by a more deeply embedded political content within courses remains unclear within the findings. Some documentary data and related learner narratives indicate that it is only through increased political and class awareness that regeneration is to be found on a global scale as much as a local, regional or national. However, other simultaneous narratives tend towards civil society coalitions as the primary road to recovery for unions and their members. Both positions are catered for within the findings, albeit to differing extents within different courses and the extent to which the instrumental framing of ideas (Benford and Snow, 2000) comes into play requires further research.

Ultimately individual adult learners reach their own political and philosophical positions as they journey along their trade union learning and activist roads, adopting their chosen frames of reference (Benford and Snow, 2000) as they travel through their personal interpretations of life events, organisation of personal experiences and individual actions. The extent to which political positions such as Marxism or socialism prevail within course content and collective learner interactions thus remains inconclusive within the limited data sets. Possible future questions to be addressed include the view that all potential learners will want to participate in overtly political or ideologically driven courses, a position that may be overly simplistic. With any pre-determined outcomes, union courses may also fail to meet the requirements of what is seen as 'emancipatory' approaches to learning as learners must construct their own 'useful knowledge' within and for themselves.

This thesis has afforded particular space to the accounts of ULRs, reflecting as it does to an extent the author's learning and activist journey. The ULR narratives of Susan, Mark, Simon and Jane indicate that for these Reps at least, their transformative journeys tend to be further along the political or cultural awareness road than others, having acquired a broader view of the world as they progress and see beyond their immediate environment into the lived experiences of other colleagues or global citizens. Their accounts suggest that they cannot easily be located as operating solely within the narrow confines of government skills development and employability agendas as they plant seeds of learning in all manner of potentially fertile soil. They combat UK worker cynicism and indifference with creative, innovative, personal agency. They can be seen to represent Gramscian style organic intellectuals when combating dominant hegemonic discourses through creating access to, and facilitation of, counter-hegemonic learning spaces. This suggests that they perceive informal learning as just as hegemonic in nature as formal. Learning may be in either the workplace or local community settings and foreground democratic participation amongst other trade union values.

In considering the extent of trade union leadership development through transformative formal learning, narratives speak of the emergence of those wanting to take a lead in some form of union organising, particularly in the case of ULRs. This is identified further below through the exploration of inextricably linked findings emerging from the pedagogical approaches adopted by union learning providers. Supportive learning pathways along which members can develop their leadership potential are clearly evident from the findings, funding permitting. With further reference to ULRs the findings indicate individual experiences involving these Reps having overcome personal difficulties, moral dilemmas or experiences of injustice in the initial phases of their unique learning journeys. Further, they appreciate that many individuals have to 'learn how to learn' when re-entering formal learning. They too thus share a strong sense of wanting to challenge and overcome examples of what they perceive as injustice at local, national and transnational levels. This perceived injustice is evident to ULRs within a work, community or broader social context and learning and development is seen by them as an important tool for challenging what affronts them. Feelings of unfairness are additionally seen by ULRs as a resource to be tapped into when attempting to encourage non-active members into greater activism and solidarities formation.

These research findings also indicate that ULRs to some extent achieve their objectives through signposting individuals to informal developmental opportunities as much as formal, wherein they utilise their own agency to agitate, motivate and activate others. Informal learning may therefore form part of any initial steps into further learning and is thus of equal value in terms of fostering and even sustaining personal development in union members. This view echoes the literature on the subject which concludes that the demarcation between informal and formal learning is almost impossible to draw and of little utility should it be achieved. The two aspects of learning are mutually supportive for ULRs who understand that formal learning is punctuated by breaks in study and periods of informal learning, brought about in part by competing life events such as relationship priorities.

Learning and personal development becomes apparent from within the findings as a right for every worker to enjoy, a right that not only enables personal transformation to occur but additionally affords protection in work. ULRs are also seen within the findings as uniquely positioned to witness the development not only of themselves but also of others. Of greatest importance to all personal growth through learning would appear to be that of the attainment of greater confidence within learners, allied to the competence that knowledge acquisition provides. For some ULRs and other participants this confidence and competence stimulates an enhanced sense of direction within work careers and trade union membership activism.

Having identified the key themes emerging from within this research and begun to better appreciate them through the lens offered by mobilisation theory, we must now also position, compare and contrast them within Mezirow's (2000) phases of personal transformative development. Firstly, we must remind ourselves that within this thesis transformation is understood as not only a complex shift in conscious awareness of hegemonic influences but also the dynamic, creative, agential mobilisation of the self. Secondly, to add to the complexity we must also remember that the fourteen research respondents differ hugely in terms of their knowledge base, abilities brought to the collective table and self-application to solidaristic activity. Nevertheless, we can broadly place our respondents within Mezirow's ten phases associated with any transformative experience. The first phases being composed of initial experiences of personal dilemma or disorientation, leading to self-examination and re-appraisal of beliefs or worldview; the mid-phases involving recognition that others experience similar thoughts and feelings, leading to exploration and evaluation of future options, including gaining new knowledge; with the latter phases involving embedding one's new found perspectives, giving confidence to try out new roles or activities. All individuals are however subject to a continuously dynamic, personal process that cannot at all times be sequentially defined.

Beginning with those positioned more within the initial phases of their transformative journeys, Linda and Rad appear characteristic of individuals

experiencing the need for personal exploration and discovery. Both are new to trade unionism, especially within a transnational perspective. The overseas visit was an eye-opener for them both and they present as hugely influenced by the new cultures that they experienced whilst in Cuba, returning perhaps with as many questions as answers. They both place newly acquired knowledge alongside previous awareness of issues, whilst dilemmas appear to emerge. A sense of uncertainty and searching pervades their narratives, allied to feelings of excitement and anticipation as they present as keen to learn more and become more involved in solidaristic activity, either in or outside of their union. Interestingly, Tracy may also fall within this category as whilst she is not new to trade unionism, she is new to labour internationalism and experiences of other cultures can be enlightening and invigorating, bringing a new dimension to her wider life experience and knowledge base gained more locally.

Bini's narrative account perhaps places her within the midway phases of Mezirow's understanding of transformative journeys as she is clearly aware of the challenging life experiences of others, yet seems to be exploring her options, acquiring new knowledge and planning future activities through her union learning opportunities. Her transformative journey proceeds via her union as she meets others at union events, networks and plans to put into action her solidaristic activities, heading it would appear towards the latter phases of development and embedding of supportive action.

The complexity of human nature would suggest that individuals can be at several points at any one time within their emotional and psychological journeys, compartmentalised as people can be by their work, union, learning, family, leisure, and travel roles and identities. Mike, Liza and Denis may also be placed within a mid-phase of their respective journeys, but again for different reasons. Mike, for example, for his search for new knowledge and understanding in relation to global issues, alongside exploration of personal options for moving forward. Denis and Liza however, speak of a sense of reawakening of their solidaristic involvement. Both are experienced in acting within a global context. Nevertheless, they seem to have had this aspect of

their lives have been dormant before their respective learning events. These events reignited previous interests and passions to address injustice through their own individualistic, practical, agential manner.

As very experienced professional educators working for trade unions or colleges, Carrie, Robert and Klaus are clearly placed within Mezirow's latter stages of transformative development as their narratives speak of reflective, confident, embedded world perspectives. All adopted a global perspective and could link their own thinking to dominant global ideologies, whilst remaining grounded and thoughtful of their own personal positions.

Lastly we consider the ULRs within our respondent group. These can be positioned firmly within the latter phases of any scale of self-reorientation towards a more counter-hegemonic world view. Within Jane's, Mark's, Simon's and Susan's narratives we can trace all of Mezirow's phases of integration into new meaning perspectives as they all speak of the hesitant early days of their transformative journeys through to the more established later periods in which firm statements, viewpoints, and political positions are articulated. They also express agential, creative possibilities as they speak of furthering their work careers or personal aims and ambitions. What is clear from the findings is that none of the fourteen respondents remain passive in approach as all appear to apply reflection from learning and self-development to some aspect of their daily lives either in work, their union, at home or in the local community.

In summary, despite the ongoing challenges the documentary findings suggest that UK trade unions are aware of the continuing need to move transnational worker solidarity nearer to the front and centre of their daily activities as they strive to create awareness and a collective response to world-wide challenges. Strategically planned learning provision appears to be in place, designed as a response to neo-liberal globalisation and in an effort to foster global worker solidarities. The extent to which this is coordinated remains unclear from this research and thus in need of further exploration. Supportive learning pathways are available for union learners, ranging from

awareness level courses to Masters level and beyond. To achieve their aims unions have called upon traditional and historically tried and tested methods of activating and actualising individual members, primarily through organising people and emphasising the necessity for social justice. Within formal learning spaces these issues are transmitted through active, collective, adult centred teaching methods.

We can see how the pace of global change within the workplace continues apace, presenting ongoing challenges for trade unions in their efforts to foster active-solidarities through learning. It may be of concern for unions that issues of perceived unequal transnational power relations, parochial attitudes and wider transnational union coordination continue to surface amongst UK members and global labour activists. Further still, issues of political identity and women's involvement also continue to surface within narrative data and thus it would appear requisite for UK unions to continue to provide learning and development opportunities to address these concerns and arrive at more advanced positions. These issues are perhaps further highlighted through the virtual absence of data relating to Global Union Federations (GUF's) and the International Trade Union Confederation (ITUC) within research findings. If disjuncture exists between UK union aims surrounding global solidarities formation through learning and membership awareness with activism, then it is here that it is primarily located.

Lastly, we can see that the formal learning approach is supported by an array of informal learning opportunities and events that attempt to attract trade union members into taking their first steps into activism, actualisation and solidarities formation. Promoting these first steps, it would seem, remains as ever one of the greatest challenges for UK unions to meet at the present time, whether through learning provision or alternative avenues. Promoting examples of injustice presents as the most motivating and mobilising issue for union learners. Both formal and informal learning are inextricably linked to union organising for renewal as both remain hegemonic in nature. As such, individual unions will place differing amounts of emphasis upon how much they value learning for global solidarities and subsequently invest in its future.

Nonetheless, the research suggests that the current UK union solidarities education strategies are embedded and influential within transformative learning spaces, structures and systems, as trade unions attempt to take their mantra of educate, agitate, and organise onto an increasingly globalised stage.

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## Appendix A

### Research Schedule Questions : students

1. *Can you tell me about your interests in international or global issues prior to the course/programme/visit starting?*

Prompts = lead respondent back in time.  
= explore learning journey in terms of global awareness.  
= any civil society engagement (e.g Amnesty International)  
= focus on labour/TU issues.  
= focus on past activism.

2. *What drew you to the course/programme/visit in the first place?*

3. *Did you have any specific areas of interest you wanted to learn about prior to the course/programme/visit?*

Prompts = expand on specific areas [e.g. environment, H+S, human rights]

4. *What lead you to decide to actually start the course at that particular point in time?*

Prompts = explore personal/situational triggers or barriers.

5. *Why do you feel it is important to learn about global (labour) issues?*

Prompts = explore understanding/awareness of 'globalism'.  
= issues of scale?

6. *Looking back, what, if any, impact do you feel your course had on you, then or since?*

Prompts = what benefit was the course?  
= explore the impact/consequences/outcomes of the course.  
= examples. activism/solidarity?

7. *Can you tell me about the course content and teaching methods?*

Prompt = political content?  
= helpful teaching methods?

8. Tell me about your interests/activism since the course?

Prompt = explore activism since finishing the course.

= further learning?

= further activism?

7. Can you tell me what you feel today about the idea of international/global worker solidarity?

Prompts = examples. Activism?

= prior to the course? Now?

= meaning of solidarity?

8. How else would you like to use your learning in the future?

Prompts = examples? Activism?

= further learning?

9. Whilst on the course, did you hold anyone responsible for social injustice?

Prompts = who, why?

10. Did the course motivate, enthuse or encourage you?

Prompts = how?

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Research Schedule Questions : tutors/managers.

1. What do you see as the key purpose of the course?

Prompts = aims, goals, objectives of course?

= aims, goals, objectives of the union/organisation in terms of active solidarity awareness building?

2. What do you see as the key challenges and opportunities involved in delivering the course, for you/students/union?

Prompts = barriers?

= what works well?

= areas for development of the course?

3. What sort of student/participant 'learning' results from the course in your experience?

Prompts = during the course? examples?

= after the course. examples?

4. Does student 'learning' lead to activism and/or solidarity in your view?

Prompt = in what way? international/global activism? examples?

= individual activism?

= union/labour activism?

5. Does the course in your view relate to international union organising to any extent?

Prompts = organising model?

= international organising via GUF/ITUC?

6. Is solidarity awareness building important to you as a tutor/manager/facilitator?

Prompts = why, how, where, when, with whom?

= shared identity, interest, injustice?

## Appendix B

Name	Union	Course attended / organised.	Job/sector
Bini	NUT	International Development: it's union work	Teacher / Secondary education
Carrie	UCU	Gender, Globalisation and Poverty Reduction	Full-time lecturer / Further education
Denis	Napo	International Solidarity / GLI International Summer School	Probation officer / Public sector
Jane	PCS	International Development Champions	Crown Prosecution Service officer / Public sector / Union learning rep.
Klaus	PCS	Certificate in Professional Development in Union Learning	Full-time learning officer / UK trade union
Linda	Napo	The Next Generation	Probation officer / Public sector
Liza	NUT	International Development: it's union work.	Teacher / Secondary education
Mark	RMT	Certificate in Professional Development in Union Learning.	Seconded trade union learning officer / Transport sector / Union learning rep.
Mike	UCU	International Labour and Trade Union Studies	Full-time lecturer / Further education
Rad	Napo	The Next Generation	Probation officer / Public Sector
Robert	UCU	Labour and Trade Union Studies	Full-time lecturer / Higher education
Simon	Unite	Certificate in Professional Development in Union Learning / Diploma in Contemporary Trade Unionism	Seconded trade union IT Technician / Banking sector / Union learning rep.
Susan	PCS	Certificate in Professional Development in Union Learning	Administration officer / Public Sector/ Union learning rep.
Tracy	Napo	The Next Generation	Probation officer / Public Sector

## Appendix C

<b>Solidarity Interviews</b>			
<b>Name</b>	<b>Country</b>	<b>Organisation</b>	<b>Role</b>
Aidee Moreno	Colombia	FENSUAGRO	National Co-ordinator
Bala Tampoe	Sri-Lanka	Ceylon Mercantile Union	General Secretary
Khalid Mahmood	Pakistan	Labour Education Foundation	Director
Maria	Colombia	Justice for Colombia	Project officer
Nalini Nayak	India	Self Employed Women's Association	General Secretary
Neal	UK	UNISON	Labour activist
Rohini Hensman	India	Independent	Writer / Labour activist
Sanjiv Pandita	China	Asia Monitor Resource Centre	Director
<b>Conference Speeches</b>			
<b>Name</b>	<b>Conference</b>	<b>Organisation</b>	<b>Year</b>
Frances O'Grady	Adelante Latin America Solidarity Campaign	TUC UK	2012
Jacobo Torres	Adelante Latin America Solidarity Campaign	CSBT Venezuela	2012
James	Napo Annual Conference	Napo	2012
Mariela Kohon	Adelante Latin America Conference	Justice for Colombia	2012
Bob Crow	Adelante Latin America Conference	RMT union	2012

## Appendix D

Course	Provider	Date	Duration	Location
Globalisation, Gender and Poverty Reduction	TUC	8-9 <sup>th</sup> March 2012	2 days	London further education college
Diploma in Contemporary Trade Unionism	TUC – Unionlearn	January 2008	36 weeks over three terms	Unionlearn on-line learning
Going Global	TUC - Unionlearn	19 <sup>th</sup> January 2013	30 hours over 8 weeks	Unionlearn on-line learning
International Development: It's Union Work	NUT	23-25 <sup>th</sup> March 2012	3 days	NUT residential learning centre
Certificate in Professional Development in Union Learning	WLRI	October 2011	Four academic semester over 2 years	London Metropolitan University
International Development Champions	GFTU	23 <sup>rd</sup> Nov 2005 (classroom); 10 <sup>th</sup> Feb 2006 (visit)	3 days classroom / 5 days overseas study visit	Eastbourne T&G Centre and visits to South Africa / Egypt
International Solidarity	GFTU	12-14 <sup>th</sup> July 2013	3 days	GFTU residential learning centre
International Summer School	GLI	8-12 <sup>th</sup> July 2013	5 days	Northern College, Barnsley
Organising in the Global Workplace	Unite	22-26 <sup>th</sup> April 2013	5 days	Unite residential learning centre
The Next Generation Programme	Napo	27 <sup>th</sup> April to 4 <sup>th</sup> May 2012	Group activities and 7 days study visit	UK and Havana, Cuba
BA (Hons) Labour and Trade Union Studies	CTUS/WLRI	October 2010	Part-time, 24 modules over six years	London Metropolitan University
MA International Labour and Trade Union Studies	Ruskin College	October 2012	One year full-time; two years part-time	Ruskin College, Oxford