Education International Research

Union Renewal in the Education Sector

Prospects for the Asia-Pacific

Michele Ford and Kristy Ward

March 2021

Education International
Asia-Pacific Region
EIAP

About the authors:

Michele Ford

Michele Ford is Director of the Sydney Southeast Asia Centre and Professor Southeast Asian Studies at the University of Sydney, where she researches labour internationalism and labour activism. Her books include *Workers and Intellectuals: NGOs, Trade Unions and the Indonesian Labour Movement* (NUS/Hawaii/KITLV 2009), *From Migrant to Worker: Global Unions and Temporary Labor Migration in Asia* (Cornell 2019) and *Labor and Politics in Indonesia* (Cambridge 2020, with Teri Caraway).

Kristy Ward

Kristy Ward is a Postdoctoral Research Associate in the Sydney Southeast Asia Centre at the University of Sydney, where she researches gender, labour and development. Her most recent research project, with Professor Ford, APHEDA, BWI and the Solidarity Center, and funded by the Australian Research Council, examines the international labour movement's efforts to reduce gender-based violence in Cambodia's construction sector.

Education International (EI)

Education International represents organisations of teachers and other education employees across the globe. It is the world's largest federation of unions and associations, representing thirty million education employees in about four hundred organisations in one hundred and seventy countries and territories, across the globe. Education International unites teachers and education employees.

Education International Research

Union Renewal in the Education Sector

Prospects for the Asia-Pacific

Michele Ford and Kristy Ward

March 2021

Published by Education International - March 2021
ISBN 978-92-95120-19-8 (PDF)

Cover picture: ACT Demonstration in Philippines, Education International / ACT

Acknowledgements:

This research is part of the "Asia Pacific Trade Union Renewal" project by Education International Asia Pacific Region and funded by the Australian Education Union (AEU) for a period of 2021-2023.

Executive Summary

The primary objective of this report is to construct an initial model of 'union renewal' or 'union transformation' to be considered for further development by selected EI affiliates in partnership with Education International's Asia-Pacific Office (EIAP). In reaching this objective, the report examines the current state of some selected teachers' unions in the Asia-Pacific, their operating environment and context, their understanding of the importance and process of 'transformation' and/or 'renewal', and the extent to which (a) there is appetite for it, and (b) if it is already taking place. Among the aspects considered are these teachers' unions' efforts to:

- reach grassroots members
- develop new strategies to organise and mobilise the membership
- prepare grassroots/workplace representatives for leadership
- build a narrative around common issue(s)
- communicate that narrative for broader advocacy and outreach
- foster partnerships through effective communication

The report embeds a discussion of ten unions from eight countries in three sub-regions within the Asia-Pacific (South Asia, Southeast Asia, the Pacific) in the broader context of union renewal efforts in the education sector globally. This discussion draws on a desk review of the scholarly literature on the renewal efforts of education unions and of union policies, and data collected in interviews conducted with (a) union leaders in Fiji, India, Indonesia, Nepal, Malaysia, the Philippines, the Solomon Islands and Vanuatu, and with (b) branch officials and (c) union members in Fiji, India, Indonesia and the Philippines in October–November 2020. Extended case studies of four unions – two in Fiji and one each in India and the Philippines zev– are appended to the report.

Based on this assessment, we conclude that, while the different teachers' unions examined in this study have different levels of experience when it comes to union renewal, some common challenges remain. One of these is the challenge of developing a clear and consistent narrative about union identity and purpose that is responsive to members. A second is to find ways to harness that narrative to guide and prioritise union work in various domains, while identifying ways to move beyond welfare provision, case-based support for individual workers and *ad hoc* programming. A third is to develop more productive ways to engage with often hostile governments while maintaining organisational independence and integrity.

Guided by our analysis of the current situation and our proposed model for education renewal, we make the following recommendations. In addition to continuing to strive to be more inclusive and effective as organisations, we suggest:

1. That teachers' unions take the opportunity to reflect on, and clearly articulate, their purpose and identity as 21st century organisations. This task should be undertaken in ways that provide members with an opportunity, and encouragement, to participate in a structured process of reflection. This discussion could be facilitated at the school level and through social media, and should focus on:
    a. What members perceive to be the union's identity and purpose at the current time and what would they like it to be; but also
    b. What specific policy issues – in terms of professional, industrial, and social justice issues – they would like their union to focus more closely on.
2. Having gone through this exercise, teachers' unions could then:
    a. Formulate a clear narrative about their identity and purpose; and
    b. Rank the specific policy issues that members have identified in terms of their potential impact on social policy and teachers' industrial and professional well-being, the feasibility of effecting change, and what success would look like.
3. Taking care to undertake further consultation with members, officials could then select one policy issue that is both important and able to be addressed. The results of this process can be used to develop a targeted and time-bound campaign with clearly identified target outcomes, either at a whole-of-union level or in a particularly active branch or branches. Depending on the issue, this campaign could involve a diverse range of tactics including engagement with government and the community, but also member- and school-focused initiatives.
4. Participating unions use this campaign as a laboratory for identifying aspects of union structure and process that need honing (for example, channels for member engagement, embedded capacity and leadership development, and resourcing) but also new ways to engage with external interlocutors.
5. Participating unions apply these insights across the day-to-day work of the union, and repeat the process, either to ramp up the gains made in regard to the issue targeted in the first campaign, or to identify another target issue.

A key mechanism for the achievement of these goals is through the development of various EIAP-supported virtual communities involving key agents of change among participating unions. These communities could provide a forum for sharing participants' experiences and generating a sense of shared

purpose and community. They could also be used to engage with experienced campaigners from teachers' unions in other countries; help structure data-seeking exercises, as participating unions reach out to their membership; and provide a sounding board on selection of issues, campaign strategies, etc, as well as a brains trust for problem-solving during the course of the campaign. These groups could be formed around shared campaign domains after individual unions have had an opportunity to determine their internal priorities. It would be important to restrict the number of participants in each to 4–6 individuals (perhaps drawn from 2–3 unions) to ensure that they function effectively as a locus of exchange.

Table of Contents

List of Figures

List of Tables

1. Introduction

Globally, teachers' unions have been forced to respond to 'educational reforms [that] have profoundly altered teachers' work and professional identity', including new curricula, new forms of accountability and standardised testing, as well as decentralisation and privatisation (Bascia and Stevenson 2017:5). In some national contexts, these pressures have undermined previously strong teachers' unions; in others, they have made the difficult task of union-building even more difficult. In much of the Asia-Pacific, they add further layers of complexity to already-complex situations which are too often characterised by government hostility, in some cases even union-busting. The question, then, is what can teachers' unions do to protect and further their members' interests in such contexts?

In this report we provide a critical analysis of the degree to which 'union renewal' is present in the education sector in the Asia-Pacific, and what forms those renewal efforts currently take. Based on this analysis, we propose a possible model of education union renewal to be considered for further development by selected EI affiliates in partnership with Education International's Asia-Pacific Office (EIAP). In reaching this objective, we assess unionists' understanding of the importance and process of 'transformation' and/or 'renewal', and the extent to which (a) there is appetite for it, and (b) if it is already taking place. As part of this endeavour, we consider unions' efforts to:

- reach grassroots members
- develop new strategies to organise and mobilise the membership
- prepare grassroots/workplace representatives for leadership
- build a narrative around common issue(s)
- communicate that narrative for broader advocacy and outreach
- foster partnerships through effective communication

We begin with a discussion of the scope and methodology of the report and the basic principles of union renewal. We then turn our attention to ten teachers' unions from eight countries in three sub-regions within the Asia-Pacific (South Asia, Southeast Asia, the Pacific), considering their demographics and strategic orientation, as well as the challenges they face and the opportunities available to them, and their potential (and appetite) for renewal. We then discuss a possible model of trade union renewal before concluding with our overall observations and recommendations for teacher union renewal in the region.

2. Methodology

This report is based on a desk study and a series of remotely conducted interviews. We began by constructing an initial model of 'trade union renewal' or 'trade union transformation' to be considered by teachers' unions in the Asia-Pacific, drawing on (a) the academic literature on the principles of trade union renewal, trade union renewal in the education sector, and trade union renewal across a range of different sectors in the Asia-Pacific, as well as (b) prior research conducted for EI by Bascia and Stevenson (2017). We then refined this model after conducting qualitative fieldwork with (a) leaders of ten teachers' unions in Fiji, India, Indonesia, Nepal, Malaysia, the Philippines, the Solomon Islands and Vanuatu, and with (b) branch officials and (c) union members from four teachers' unions in Fiji, India, Indonesia and the Philippines. Case studies of Fiji, India and the Philippines, which critically assess how and in what forms and shapes 'trade union renewal' or 'trade union transformation' has taken place, appear in Appendices A, B, and C. Country-wise, case selection was made in consultation with EIAP and took into consideration countries' strategic importance for EI and EIAP.

We conducted interviews of between one and two hours with individual union leaders via Zoom in October–November 2020. For a sub-set of countries, we also interviewed groups of 2–3 branch officials and 2–3 ordinary members drawn from geographically diverse areas, as well as with groups of women and younger members. We also interviewed the EIAP regional coordinator and a former EI campaigns director, who now heads a major teacher's union in Australia. Interviews were conducted in English, with the exception of interviews involving members and officials from the Indonesian Teachers Association (which were conducted in Indonesian by Professor Ford) and India (where interviews were conducted in a mixture of English and Hindi, with the support of an interpreter). We asked our informants about demographic characteristics and internal structures and activities (internal structures, goals, visions, practices and policies and services to members) of their teachers' unions; the political and education context in which they operate; their role in different national settings; and shifts in their role and context over time. Interview data was supplemented by a desk study of EI's regional reports and union documents, as well as relevant publicly available materials.

3. Starting Points

The literature on union renewal/revitalisation focuses on the proactive strategies adopted by unions in their attempts to renew their influence at work and in broader society (Turner 2004). A multitude of studies have examined the drivers, strategies, actions, and outcomes of union renewal (for an overview, see Ibsen and Tapia 2017). Among the most influential models presented in this literature is the typology of renewal strategies proposed by Frege and Kelly (2003) in their seminal article comparing unions' renewal efforts in Germany, Italy, Spain, the United Kingdom, and the United States of America. In this article – which formed the basis for an edited volume published in the following year (Frege and Kelly 2004) – they identify six strategies of union renewal, which they position within what they describe as 'a social movement model of union strategic choice' (Figure 1).

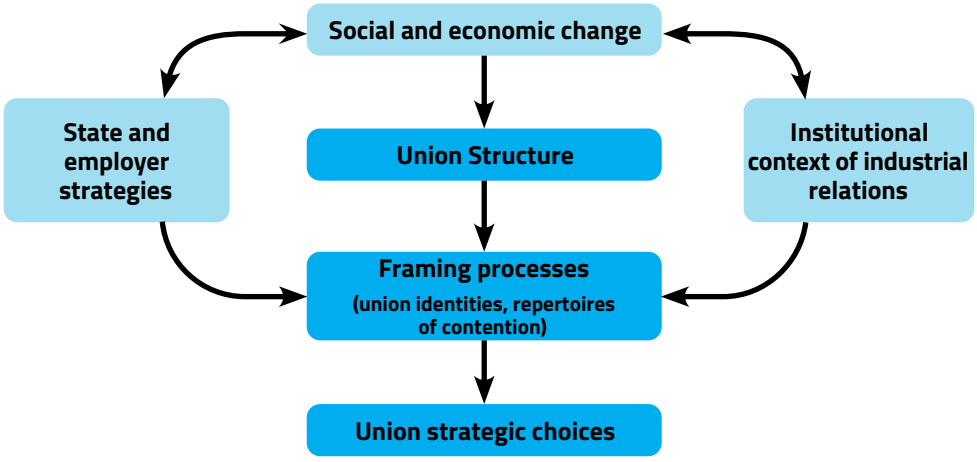

Figure 1. **Frege and Kelly's (2003) Social Movement Model of Union Strategic Choice**

The six strategies identified by Frege and Kelly (2003) as contributing to union renewal include organising, organisational restructuring, partnerships with employers, political action, coalition-building with social movements, and international links. Unions' emphasis on one or other of these strategies, they argue, is a result of institutional differences, identity differences, and differences in employer, political party or state strategies, but is also influenced by unions' internal structures and framing processes. While this typology is based on unions' experiences in selected advanced economies in Europe and North America, these strategies are all relevant to union renewal in the Global South, although it is important to remember that politics, social movement alliances and international links tend to be more prominent strategies among Southern unions than in the Global North (Ford 2020).

Just as we need to adjust Northern models of union renewal to accommodate the particular characteristics of unions in the Global South, we need also to adjust them to accommodate the specificities of teacher unionism. *First*, teachers' unions operate both as industrial relations actors and professional associations. The intersection between union members' professional and union identity is not unique to teachers, but it nowhere more pronounced than in education. In some contexts, teachers' unions adopt a third function, either as actors in broader movements for social justice or, conversely, as mutual aid organisations.

Second, it is also necessary to consider the triple role that governments play in public sector education. As in other forms of public sector work, the state is both employer and arbiter of teachers' conditions of employment. Unlike civil service unions, however, a single teacher union may accommodate members in the private and public sectors or, if representing teachers in a single sector, may need to work closely with unions representing teachers in the other to achieve its professional and industrial goals. In addition, governments are the source of social policy, which sets the parameters for the education sector as a whole.

Third, just as the visibility and importance of education as a public good can be used by teachers as a weapon in the struggle for better policy, it can be used against them, as indeed it is used against nurses, in hostile claims, for example, about teachers' decisions to put their 'own' interests ahead of those of their pupils, and of society as a whole.

Taking these specificities into account, a number of useful insights can be gleaned from the relatively modest literature on education union renewal. With regard to the *role of teachers' unions*, Bascia and Stevenson (2017: 57) argue that it is unhelpful, even harmful, to treat their industrial and professional purposes as dichotomous, as the intensification of work and reduced autonomy are 'simultaneously industrial and professional challenges'. Popiel (2013) goes a step further, finding that teacher union members were most likely to be disengaged if they felt that the union only addressed working conditions and salaries, instead of also emphasising pedagogy *and* broader social issues. Consideration of these divisions, their impact at different levels within unions, and of ways to overcome them are thus a cornerstone of union renewal in the education sector.

With regard to the *triple role of governments*, Bascia and Stevenson (2017: 58) note that teachers' unions must find a way to 'simultaneously work with and against the system' in order to secure policy advances while maintaining an appropriate level of openness, transparency, and ultimately independence, from government. This question is made even more complicated in countries where unions are less-well integrated in an institutional sense, where governments also determine if, and how, unions operate at all. Others have argued that in order to shift the balance of power and promote an alternative agenda, for example, in response to cuts in education funding as an austerity measure, it is sometimes necessary for teachers' unions to decentre their relationship with government, instead focusing more intensively on broader social partnerships (Brogan 2014; Grenier and Jalette 2016).

With regard to the *social justice*, Brogan (2014) points out that public sector workers are in a unique position to build labour–community alliances by virtue of their concentration in urban centres and their strategic location as providers of a broad range of public services. Teachers are especially well-situated for this purpose, he argues, because of the unique nature of their workplaces, which are embedded in the heart of the community. He documents how the Chicago Teacher's Union effectively pushed back against the neoliberal project in public education by building strong alliances with parents, students, and community organisations on a broad range of social justice issues affecting the community, as well as building rank and file power in the workplace.[1] As Stevenson (2015) notes, this approach echoes broader debates about social movement unionism within labour studies, in which its proponents argue that unionism can only be transformational if unions reach beyond their own membership to form alliances with other social movements.

How, then, do these insights inform the current study? Based on an assessment of teachers' unions in seven countries (Chile, Kenya, New Zealand, Poland, Scotland, Turkey and the United States of America) commissioned by EI, Bascia and Stevenson (2017: 2–3) identify seven 'challenges', which they urge unionists to consider when formulating their renewal strategies. These are:

- Organising around ideas
- Connecting the industrial and the professional
- Working both with, and against, government and employers
- Building at the base
- Building democratic engagement within the union
- Connecting the profession both horizontally (between unions) and vertically (between teachers and school leaders), so that they can speak for the profession as a whole
- Creating wider alliances with the broader union movement, civil society groups, parents and students, in order to mount successful public policy campaigns

This list of 'challenges' captures the three main dynamics we have identified in the discussion above.

Elsewhere in their report, Bascia and Stevenson (2017:9) acknowledge that 'union strength derives from the ability to work at multiple levels in any education system, and to be able to assert influence at all these levels', noting that unions must make 'connections locally, nationally, *and* globally' if they are to 'to act as the authentic voice of the teaching profession'. At the heart of their assessment,

1 For another argument about the importance of social justice as a focus in hostile climates, see Peterson (2015). Peterson was the president of the Milwaukee Teachers' Education Association at a time when the state government enacted a law that prohibited payroll deduction of union dues and 'agency shops', and 'took away virtually all collective bargaining rights, including the right to arbitration', leaving 'intact only the right to bargain base-wage increases up to the cost of living'.

however, is a plea for *internal* renewal, 'premised on the simple principle that union influence depends ultimately on building the capacity, commitment, and confidence of individual members to act collectively'.

We agree that efforts to increase union membership and member participation, develop members' skills as professionals and unionists, and bring together teachers' professional and union identities are vital to teacher union renewal. However, teacher union experiences in the Asia-Pacific suggest that it is not enough to have better organisations; it is also necessary to change the rules of the game. As Turner (2004: 3) argues, a key barrier to unions' capacity to promote reform 'is when unions take a narrow perspective and fail to develop the linkages, alliances and broad reform vision required to build the necessary political power'. As a consequence – and as Bascia and Stevenson's list of 'challenges' attests – it is vital that teachers' unions in the region find new ways to engage with external stakeholders, as well as with their existing and potential members if they are to (re)assert themselves as strategic actors within the national and international education landscape.

4. The Regional Context

As a region, the Asia-Pacific has four distinct sub-regions – Northeast Asia, South Asia, Southeast Asia, and the Pacific – each with its own complex political, economic, and educational landscapes. In addition to high-income countries like Australia, Japan, and Singapore, with their advanced education systems, the region is home to many low- and middle-income countries, all of which struggle to serve the education needs of their populations. Among these are the countries whose unions are the focus of this study: Fiji, the Solomons and Vanuatu, all micro-states in the South Pacific; India and Nepal, representing South Asia; and Indonesia, Malaysia, and the Philippines in Southeast Asia (Table 1).

Table 1. Education in context in selected countries in the Asia-Pacific

	The Pacific			*SAARC*		*ASEAN*		
	Fiji	*Solomons*	*Vanuatu*	*India*	*Nepal*	*Indonesia*	*Malaysia*	*Philippines*
Population (millions)	*0.9*	*0.7*	*0.3*	*1,366*	*29*	*271*	*32*	*108*
GDP (USD billion)	*5.5*	*1.6*	*0.9*	*2,869*	*30.6*	*1119.2*	*364.7*	*376.8*
GDP per capita (USD)	*6,176*	*2,374*	*3,155*	*2,100*	*1,071*	*4,136*	*11,414*	*3,485*
Female adult literacy %	*99*	-	*87*	*66*	*60*	*94*	*94*	*98*
Male adult literacy %	*99*	-	*88*	*82*	*79*	*97*	*96*	*98*
Compulsory school age (millions)	-	-	-	*200*	*6*	*42*	*3*	*28*
Govt expenditure on education (% GDP)	*4*	-	*5*	*4*	*5*	*4*	*4*	-
Teacher comp. % public educ expend	*99*		*68*		*58*	*61*	*48*	

		The Pacific			SAARC		ASEAN		
		Fiji	Solomons	Vanuatu	India	Nepal	Indonesia	Malaysia	Philippines
Primary	Teachers (thousands)	4	4	2	4,339	201	1,772	235	496
	% Female teachers	59	44	57	54	45	67	70	87
	% Qualified teachers	-	80	72	92	97	87	99	100
	Pupils per qualified teacher	-	32	37	30	20	19	12	27
	% Private school enrol.	-	32	37	44	20	23	12	27
Secondary	Teachers (thousands)	5	2	1	6,103	123	1,637	229	422
	% Female teachers	57	33	42	46	24	56	67	71
	% Qualified teachers	-	84	79	87	89	96	95	100
	Pupils per qualified teacher	-	17	23	23	36	16	-	24
	% Private school enrol.	-	30	8	52	-	42	9	25
Upper Secondary	Teachers (thousands)	3	0.5	0.2	2,741	64	748	-	97
	% Female teachers	50	31	41	43	19	56	-	62
	% Qualified teachers	-	70	80	91	89	95	-	100
	Pupils per qualified teacher	-	-	39	27	28	16	-	28
	% Private school enrol.	-	33	9	58	-	46	12	46

Source: World Bank Development Indicators, latest available to 2019. Where no figures are available since 2010, a blank space has been left.

As Table 1 suggests, the populations, Gross Domestic Product (GDP) per capita and rates of adult literacy vary dramatically across these eight countries. While government expenditure on education as a percentage of GDP is similar, the proportion of expenditure on public education that is allocated to teacher compensation differs markedly across the five countries for which this statistic was reported. There are also significant differences in the levels of qualification and feminisation of the teaching profession, the ratio of pupils to qualified teachers, and the relative importance of private schools in the education system.

There is less differentiation between the eight countries in terms of political climate. Many of these countries have governments that, while formally democratic, tend to varying degrees towards authoritarianism. Socially, also, they tend towards conservatism. These shared characteristics have important implications for teachers' unions and labour movements more generally, as political and social context shapes the strategies that unions can deploy, how they communicate and interact with members, and public perceptions of union value.

5. The Teacher Unions

The experiences of teachers' unions in the Asia-Pacific are as varied as the national contexts in which they are located. In some countries, they are strongly embedded in the institutional landscape, and wield some influence over education policy and practice. In others, they struggle to exist in the face of hostile governments, poorly resourced education sectors, and low public recognition of their role in protecting teachers and promoting quality education.

In this section we provide an overview of the demographic profile of selected unions, and an analysis of their strategic orientation and the challenges they face. In addition to providing a snapshot of these particular unions, this section forms the basis for our discussion of a possible model for education union renewal in the region.

5.1 Demographics

This report is based on a study of ten teachers' unions, which were selected by the researchers in consultation with the EIAP, taking into consideration particular countries' strategic importance and affiliates' appetite for a change. The unions that contributed to this study were:

- The All India Primary Teachers Federation (AIPTF)
- The Alliance of Concerned Teachers, the Philippines (ACT)
- The Fiji Teachers Association (FTA)
- The Fiji Teachers Union (FTU)
- The Indonesian Teachers Association (PGRI)
- The Institutional Teachers Union, Nepal (ISTU)
- The National Union of the Teaching Profession (NUTP, Malaysia)
- The Nepal National Teachers Union
- The Solomon Islands' National Teachers Association (SINTA)
- The Vanuatu Teachers Union (VTU)

All ten of these unions are EI affiliates with an established history of teacher organising and a substantial national footprint (Table 2).

Table 2. Statistics on selected teachers' unions

	The Pacific			SAARC		ASEAN		
	Fiji	*Solomons*	*Vanuatu*	*India*	*Nepal*	*Indonesia*	*Malaysia*	*Philippines*
EI-affiliated teacher federations	*2*	*1*	*1*	*3*	*3*	*1*	*4*	*5*
Teacher union membership (in Thousands)	*9.3*	*3.5*	*1.56*	*4,300*	*167.5*	*2,200*	*312*	*197.25*
Indicative density	*81%*	*51%*	*54%*	*33%*	*43%*	*53%*	*80%*	*259*
Membership of target unions (in Thousands)	*9.3*	*3.5*	*1.56*	*2,300*	*87.5*	*2,200*	*230*	-
Membership trends of target unions	↑	↑	↑	↓	↑↓	↓	↑	↑↓
Women's membership of target unions	*50% (FTU)* *60% (FTA)*	-	*60% (VTU)*	*40-50% (AIPTF)*	*20-30% (NTA)*	*56%*	*70%*	-
Women's leadership of target unions	*45% (FTU)* *30% (FTA)*	-	*30% (National)* *Otherwise very low*	*33% quota (Some states)*	*38% (NTA Nat)* *20% (ISTU Nat)*	*30-50% (National)* *(Varies across provinces)*	*10-15%*	-

Note: Indicative density was calculated using World Bank estimates of teacher numbers and union estimates of member numbers. Note that union estimates are not necessarily confined to dues-paying members. Blank spaces have been left where information was not provided.

With the exception of the Philippines, membership density in the education sector is relatively high. Moreover, as Table 2 reveals, the unions included in this study account for a substantial proportion of unionised teachers in their respective countries. Importantly, also, with the exception of the ISTU, all the unions primarily or wholly represent teachers in the public sector. In four of the eight cases, there is an upwards trend in membership numbers, while in the two largest, membership is declining. The final two reported some instability in membership numbers, in the case of the Philippines, as a direct result of government repression. These trends aside, it is notable that membership density among teachers is far higher than in the manufacturing sector in any of these countries. As Table 2 also reveals, the proportion of women members varies across the unions, as does their representation in leadership positions.

5.2 Strategic Orientation

The ten unions examined in this study prioritise one, or a combination, of these four strategic orientations, namely, labour relations, profession, social justice, and mutual aid (Table 3).

Table 3. Relative importance of different activity domains

		The Pacific				SAARC			ASEAN		
		Fiji		Solomons	Vanuatu	India	Nepal		Indonesia	Malaysia	Philippines
		FTA	FTU	SINTA	VTU	AIPTF	ISTU	NNTA	PGRI	NUTP	ACT
Mutual Aid	Welfare services	✓✓✓	✓✓✓	✓	✓✓	✓	✓	✓	✓	✓✓✓	
	Incidental consumer benefits	✓✓✓	✓✓✓	✓	✓✓	✓	✓	✓	✓✓	✓✓✓	
Labour Relations	Policy	✓	✓	✓✓	✓✓	✓✓	✓✓✓	✓✓✓	✓✓✓	✓	✓✓✓
	Case Management	✓	✓	✓	✓✓	✓	✓✓	✓✓	✓✓✓	✓	✓✓
Profession	Policy	✓	✓	✓	✓✓	✓✓✓	✓✓	✓✓	✓	✓	✓✓✓
	Professional Development	✓	✓	✓	✓	✓✓	✓	✓	✓✓✓	✓	✓✓✓
Social Justice	Education Issues		✓			✓✓	✓✓	✓✓	✓		✓✓
	Broader Social Justice Issues	✓✓	✓✓		✓	✓✓	✓✓✓	✓✓✓	✓		✓✓✓

Note: A greater number of ticks suggests a greater emphasis. The number of ticks allocated reflects the emphasis placed on particular activities in interviews rather than an independent assessment of the different domains of activity.

Within each of these four categories, two main sub-categories can be identified. In relation to mutual aid, these are welfare – pensions, health insurance, and other financial services that have a fundamental impact on members' lifestyles – and incidental services, like consumer discounts and social activities.

In the categories of labour relations and the profession, it is possible to distinguish between policy interventions (which are particularly difficult to make in contexts where governments are hostile) and direct interventions dealing with individual labour relations cases, for example, an unfair dismissal, or providing professional development. With regard to social justice, it is possible to distinguish between a social justice orientation related directly to education and one that engages also with broader social issues.

As we noted in Section 3, the tension between the industrial and professional functions of teachers' unions has long been recognised at a global level, and there has been increasing discussion of their social justice function, for example, in promoting gender and racial equality. Mutual aid does not feature in the literature but, as Table 2 suggests, it is an important orientation in some countries in this region, as the discussion that follows reveals.

5.2.1 Mutual Aid

While unions in many countries around the world offer some consumer-oriented services, mutual aid is unusually prominent as a strategic orientation for teachers' unions in some of the national contexts we examined. Most notable among these were Fiji and Malaysia, where the unions we engaged with a wide range of welfare and social services for members, ranging from low-interest housing and personal loans to health insurance and funeral benefits.

These services have given unions considerable leverage to recruit and retain members, resulting in a high level of membership across the teaching profession in both countries. A branch official from Fiji's FTU observed:

> *People come with different reasons to join the union. Everyone has their own reason. For example, some see the collective strength, and they know maybe through listening to people or through their experience, where there are able to know that when they join the union there is someone who will back me up. But there is another group that would go for the cooperative, for the welfare. Some are just going for that. You would be surprised to know there are some that are not members, but when their health starts to deteriorate at 32–35, they decide to join the union because of the welfare.*

In Malaysia's case, demand for these services is such that the NUTP has decided to limit new memberships among older teachers. As the NUTP General Secretary noted:

> *We have stopped admitting members who are 50 and above because we have lots of financial benefits that they can get. We want to ensure that we get quality members joining from the beginning, not at the end*

of the career. There's a death benefit fund, critical illness benefit, demise of their parents, children getting good results in certain exams get some money. Indirect benefits include insurances and loans at good rates.

In addition to these welfare services, the NUTP also provides a range of incidental consumer benefits to members, which it sees as sitting at the heart of its renewal strategy. A tie-in with a supermarket chain, which allows members to access wholesale prices, is already in place, as well as a deal with an IT provider, which is set to provide members with an e-wallet and other online benefits. The union has also approached food retailers, airlines, and car manufacturers.

Indonesia's PGRI has also recently begun to provide incidental consumer benefits through its digital membership card and Bantu Guru (helping teachers) app. Based on research into dissatisfaction with the union the in the province of Riau, where union structures were moribund and members had not paid dues for many decades, the app was designed by a young local union official. The app provides a range of services including professional development and requests for industrial support, but also discounts on services and goods and paying for tolls. It is also designed to overcome the challenges of dues collection, since members lose access if they do not pay their dues.

5.2.2 Teachers as Workers

A key focus for teachers' unions in the Asia-Pacific is their labour relations function, which incorporates policy and case management elements. At a policy level, issues of pay grades and scales, appointments, transfers and contracts, and recognition of para-professional and casual teachers are of critical importance in all countries. In Vanuatu, for example, the VTU successfully negotiated to increase severance pay from one to two months, and for the transition of new graduates – some of whom had been awaiting posting for five years – to be placed on the Ministry's payroll. In another example, PGRI took a policy interest in workforce planning. As one union leader reported, 'If teachers are pooling in the city, because they don't want to go out to isolated areas, we help the government to make the allocations.'

Unions have also played a key role in negotiating with the government on post-facto service entry requirements. In India and Malaysia, governments require teachers to sit and pass various exams in order to continue in their role. The AIPTF and NUTP have both advocated for the cessation of this requirement. For example, in 2019 the Malaysian Ministry of Education passed a regulation that those teaching English would be required to sit a Common English Framework of Reference exam. As many English teachers are not formally trained in English, the NUTP advocated for the Ministry to amend the policy so that only formally trained English teachers were required to sit the exam. Similarly, in the Indian state of Haryana, the government declared

a policy that only teachers who pass a test could be in service and get the increments. Those that did not pass would lose their job. The AIPTF and its affiliates boycotted the test, forcing the government to rescind the policy.

Support for individual teachers in the workplace is a core activity of all the unions we studied. Union representatives support teachers to secure promotions, salary increments and special allowances as individuals, to prevent punitive transfers and to seek redress in regard to issues like bullying and harassment at work from senior colleagues, to defend teachers accused of violent acts towards students, and to challenge suspension or termination decisions made by a school or the Ministry. The officials and members we spoke to reported a significant degree of success, and member satisfaction, in the case management aspect of their industrial relations function.

5.2.3 Teachers as Professionals

The key to making unions more relevant to members is the adoption of strategies that focus on the relevance of unions to teachers in the workplace and in their profession. All ten unions offered some form of professional development for their members. In some cases, they provide a comprehensive programme of training and continuing professional education, sometimes supplementing Ministry initiatives and sometimes with quite a different focus.

Although we did not have an opportunity to observe these programmes first-hand, their quality appears to vary. In some contexts, union officials described a comprehensive and member-responsive suite of professional development programmes for members, some of which were externally funded (in the Philippines, ACT provides this with solidarity support from the Lärarförbundet, the Swedish Teachers Union, and the AIPTF with solidarity support from the Canadian Teachers' Federation, Canada). A number of unions have also taken the opportunity to move professional development activities online during the COVID pandemic. For example, PGRI played a key role in developing virtual courses to upskill teachers so that they could more effectively deliver their classes online.

However, in several cases professional development appeared to be sporadic, and focused on topics generated by union leadership without consultation with union members. In Fiji, courses were delivered less frequently than in other countries and topics were mostly set by the union leadership. In addition, participants were paid an allowance to attend these and many other union activities. Several informants commented that members would be much less likely to attend training courses if this payment were not provided. COVID has also interrupted professional development activities in several countries. For example, in Vanuatu, professional development courses had ceased altogether due to COVID concerns.

Some unions also have adopted a policy focus on professional development. In Nepal, for example, unions had pushed for the government to provide better professional development for teachers. By contrast, in India, some

AIPTF affiliates opposed government demands that teachers take an excessive number of online training programmes in response to COVID, mobilising members to boycott the training. As one state-level official reported,

> *We said we won't do more digital work. You can give us printed material or you can organise a seminar with a limited number of teachers. And we won't install these apps. They're only increasing the money for their developers … Then we had a negotiation with the department. They said they could delete all but one app, and if you are not comfortable with digital training, then teachers have different options (physically or online).*

However, regardless of the focus or delivery mode of professional development programmes, the union leaders considered them an important part of their offerings to members.

5.2.4 Social Justice

The final domain of activity is social justice. In this domain, teachers' unions undertake practical initiatives to support students and communities, as well as campaigning on education and broader social issues.

Unions in several countries engage in education-focused community initiatives. For example, in Fiji the FTU provides tutoring to students free of charge after school hours. In India, one AIPTF affiliate helped set up computer labs in schools with external funding. Outside of education matters, some unions in India also assist in blood donation drives. In the Pacific, where Fiji, the Solomons and Vanuatu are countries routinely affected by natural disasters, unions play a major role in provision of emergency relief, particularly as governments are often slow to respond. The General Secretary of the VTU reported that his union had:

> *decided to use a relief fund, around 11 million Vatu, to purchase all the relief supplies for all our members … and then we visited all the branch members throughout all the provinces in the north. That's when we kept them motivated because the government was very slow to immediately attend to affected populations. The VTU was the first organisation to visit communities and provide relief supplies.*

From March 2020, the COVID pandemic prompted unions to engage in an extended range of community outreach and support activities within schools. In India, teachers disseminated public health messaging information. In the Philippines, the union provided community tutors due to the limited face-to-face interaction between teachers and students. In Fiji, both the FTA and the FTU allocated funding for food and medical supplies to affected households and communities.

In addition to practical initiatives, some teachers' unions engaged in campaigning around social justice can focus on education or on broader social issues. Within the education domain, a major focus is on public education, in line with EI's campaign on quality education for all. Teachers' unions have campaigned on enhancing the quality of education, including in Fiji, where the General Secretary of the FTA linked these campaigns to improving public opinion of unions:

> *We have engaged in a strong campaign for quality education for all. It's important to spread the wider role, the gospel of the wider role, of the trade union movement. That's going to give us more impetus in terms of getting our image further enhanced at the community level.*

One specific question of concern to unions representing public school teachers is privatisation. In Indonesia, PGRI rallied members against two recent government initiatives including a programme that sought to outsource initiatives to improve the quality of teachers and principals through civil society organisations (Program Organisasi Pengerak), which the union believed were ill-equipped to undertake this task. In Nepal, unions have taken numerous steps to halt rapid privatisation of the education sector, including establishing a national convention on the Right to Education and Privatisation of Education, directly engaging with parliamentarians and proposing amendments to the Right to Education bill. In India, some affiliates are staunchly opposing privatisation on the grounds of social justice. As one official commented:

> *The Department of Education is pushing for privatisation, but the union is capable of opposing them. We are fighting for the rights of students, and especially poor students. Rich students can join a privatised school. But 20 percent of students are below the poverty line. Where will they go?*

These comments reflect a long-standing campaign. In February 2014, for example, the AIPTF held teachers' marches through 23 states in protest against a policy promoting Public Private Partnerships in school education. Participants in three separate marches covered a distance of 20,641 kilometres and organised 1,874 public meetings and 93 press conferences. The marches ended in New Delhi, where a conference was attended by government officials, civil society activists and representatives of international organisations (EI 2015).

Not all teachers' unions we studied engage with broader social justice issues. Among those that do, ACT stands out as the most involved, with its emphasis on bigger-picture social justice issues such as human rights, including gender rights and the rights of indigenous peoples, as well as land reform and the environment. ACT pursues these issues through public campaigning and alliance-building with communities and other social movement actors.

5.3 Challenges

Challenges identified by our union informants fell into three main categories: their relationship with government, how their organisations functioned, and how they engaged with members. In analysing their narratives on challenges, it is useful to consider the five key threats to unions more generally in the contemporary era identified by Rose (1993), namely:

- deinstitutionalisation (restriction of legal rights)
- exclusion (from workplace governance and state policymaking)
- pacification (a decrease in collective action)
- demoralisation (as their public image eroded)
- contraction of membership

While derived from consideration of unions across a range of sectors in the Global North, this categorisation offers a useful starting point when considering the challenges faced by teachers' unions in the Asia-Pacific in relation to government, their internal structures, and member expectations and engagement.

5.3.1 Government as Policymaker, Arbiter, and Employer

Governments play an important role in determining the 'rules of the game' for unions in all sectors and in all national settings. In the education sector, the role of government is particularly complex, since it is the source of social policy, but also both employer and arbiter of teachers' wages and working conditions. This triple function is particularly significant in countries where unions' role in society is not fully accepted, as is the case in all the countries examined for this study.

Deinstitutionalisation affects unions' ability to operate and negotiate on behalf of members. Governments in all the eight surveyed countries recognise the right of private sector employees to unionise. The right to unionise in the public sector is more restricted (in Indonesia, for example, public servants are not permitted unionise). The right to unionise of teachers employed in public sector is recognised in all eight countries. Teachers' unions' capacity to operate in ways that best represent the members of their interests is, however, limited in various ways both through regulation and in practice.

In some cases, deinstitutionalisation is achieved through decentralisation. In Nepal, teachers' unions have access to a permanent structure of social dialogue at the national level. But while social dialogue is also meant to take place locally as well, some regional governments have failed to make provisions for it in their own regulations. As a result, teachers' unions are devoting a great deal of time and energy – time and energy that could be used

in other ways – to fighting for the establishment of permanent social dialogue forums at the regional level. In the Philippines, teachers' unions are forced to fight for recognition at the regional level before they can negotiate collective agreements that cover benefits and working conditions. Currently, ACT – the largest teacher union in the Philippines – is recognised as a collective negotiating partner in only five of the country's 17 regions. Securing the support of the majority of the teachers in a region, as ACT's General Secretary observed, 'requires a lot of resources'.

In terms of *exclusion from workplace governance and state policymaking*, union access to policy forums and workplaces varies greatly across the countries we examined. In the Philippines, ACT is guaranteed access to schools in regions where a collective negotiation agreement is in place. However, it cannot formally access schools where another union has majority status, or where ACT's status as a bargaining agent is still being negotiated. By contrast, in Fiji, unions require permission from the school head to access a school, a requirement that has severely constrained union access.

At its best, government and unions have a robust cooperative relationship. Where productive relationships can be established, unions have more chance of influencing education policy. For example, VTU's General Secretary reported that the Minister of Education came to the union office to discuss the situation of teachers who are working but are not on the payroll:

> ***We agreed with the amount, 610 million, and the Minister put the amount in the Council of Education through the Minister's Budget Committee. That's [how] we settled all the outstanding issues of the teachers. Now they are on the payroll system of the government.***

At its worst, unions struggle to secure a seat at the table. Informants in a number of countries reported that government engagement with unions for policy formulation has deteriorated in the past decade. In Fiji, teachers' unions have been increasingly excluded from forums in which key decisions are made by the government not just regarding the education system but also about teachers' working conditions. This is a notable shift in the past decade when unions were once key interlocutors of the government on such matters. Union officials attributed these shifts to the hostile attitude of government, and also to wider public sector reforms initiated by multilateral donors. There are also examples where the government had used its role as an employer to limit unions' access to schools and teachers.

There is also clear evidence of *pacification* in some of these countries. The issue of collective action is one that troubles public sector teachers worldwide because of governments' dual status as their employer and the authority that implements industrial relations policy and resolves labour disputes. This places teachers and unions in a difficult position, as they seek to work cooperatively with education authorities on broader education policy issues while also pressuring them – through labour protests and campaigning – in

their role as an employer. In Nepal, for example, the NTA intentionally refrains from strikes, instead seeking to influence and work with government for policy change. The stakes are, of course, much higher, in contexts where governments take a hostile stance towards unions. In Fiji, for example, the right to strike is severely restricted under the Essential National Industries (employment) Decree 2011.

A further strategy of the government has been *demoralisation*. A clear example of this is the case of ACT, which the Philippines government has accused, alongside other progressive organisations, of being a Communist front (a practice known as 'red-tagging') and targeting it under new anti-terror laws. These actions have very real consequences both for activists and for unions' reputation. Individual union officials are harassed and threatened, and many teachers refuse to take up union membership for fear of personal and professional reprisal by the government. As a consequence, the union has 'to counter-narrate the state propaganda machine'. Similar patterns in government–union relations are seen in other countries with highly repressive governments, most notably Fiji.

In spite of these challenges, teachers' unions in some of these countries have managed to maintain *relatively high levels of membership*. This is a considerable achievement in a global context where union density is declining in most sectors and in most countries around the world. Recruitment and retention of members is important, especially as teacher union membership tends to be skewed towards older members of the profession, and largely ignores increasingly casualised segments of the workforce. But a deeper question remains: what does a high level of union density mean in contexts where unions' capacity to represent their members' interests are constrained by hostile governments?

5.3.2 Unions as Organisations

Based on our discussions with officials and members, it is clear that organisational capacity varies significantly both *between* and *within* unions. Even in the most dynamic of the region's unions, union presence and activity across different branches is uneven.

Strategies for engagement with government and school heads – and also with members – varied considerably. In Fiji, one union recruits pre-service teachers directly from university, whereas the other does not. Some unions had taken considerable steps to target school heads and decision-makers. In Indonesia, branch officials had utilised COVID as an opportunity to upskill teachers in online teaching. By involving school heads in the process, union officials introduced the union to them as a professional development hub for teachers, rather than just an agitator on workplace disputes and industrial relations policy. In the Philippines, similar strategies helped unions to secure representation on school-level grievance committees as mandated in their collective negotiation agreements. In other examples, unions held meetings at

the school level, but did little else. While this lack of purpose at the school level can in part be attributed to employer hostility, this situation is also a reflection of how unions plan, strategise, and operate.

Boosting organisational capacity is challenging in contexts where dues are very low, often collected manually and sporadically. Dues in many countries are set at a flat rate that do not take into account the differing incomes of teachers. In addition, they represent a very small proportion of teachers' salaries, although dues are much higher in countries where welfare provision is a core component of union activities. Dues collection is also problematic, with many countries continuing to collect them manually. Some countries have responded directly to these issues, as in the case of Indonesia, which is currently introducing a digital mechanism for dues collection that automatically limits access to member services if dues payments are not made.

Unions also face challenges in terms of their representativeness. Teachers' unions across the three sub-regions have taken considerable steps in recent years towards diversification of their membership and internal union structures. This has primarily included gender quotas for elected union positions. In several countries, quotas have been introduced to try to improve the representation of women. In India, the AIPTF now has a 33 percent reservation for female office bearers at each level. However, these strategies are not always uniformly successful. Some of the AIPTF's affiliates have achieved the 33 percent benchmark while others are lagging behind substantially. In Vanuatu – as in the Solomons – improvements in the gender balance among the national leadership in recent years have not been reflected at the lower levels, which remain relatively senior and heavily male-dominated.

There was also a general consensus that reserved positions for women were generally the less important ones, and that barriers existed for female leaders in reaching the national leadership. Indeed, the only union we examined that has a woman in a top leadership position is Indonesia's PGRI. Moreover, simply occupying a senior position does not guarantee that women have a voice. Female leaders across many countries commented that even when women have taken up key leadership posts, they, too, often remain excluded from decision-making processes within the union.

As the *EIAP Strategic Framework* for 2019 emphasises, the active participation of young members in union structures and activities at all levels is an essential component of strengthening and growing the union's membership (EI 2019a). Teachers' unions across the region have also worked to attract more younger members to their ranks. Some unions, including ACT in the Philippines, recruit union members during their university studies. As one young leader reported:

> *ACT has a youth branch in some of the universities that have an education course. I am the product of that youth branch. That's one of the best practices we have in our union, that when you are still in college, studying education, you have an opportunity to get organised and to learn about the issues in the education sector.*

In Fiji, sports and social events have been a successful strategy of unions to engage young teachers. In India, frustration with the AIPTF's lack of attention to the issues of young teachers prompted several younger members in one state to run for elected positions, resulting in a refocusing of union priorities. In the state of Haryana, it has even led to prohibitions on retirees taking up leadership positions within the union in an effort to better reflect membership composition. A state union leader reported, 'More than 80 percent of our members are youths. Retired people can't be in the leadership. Older people can only be advisers. All of our top leaders are below 45.'

Our informants pointed to the benefits of making space for younger leaders in the union structure. One branch official in the Philippines commented:

> *It's important to have the young leadership in the union. I do not suggest discriminating against the old ones, but we need a balance. Because now we are changing, the platforms are changing, the situation is changing. How can the union be alive in this situation, how can it be sustained with the fast-changing time. We need to act very fast.*

Having a woman or younger member in decision-making positions at the national or state level does not guarantee a different kind of leadership – although women officials and members we spoke to in both Indonesia and India believe that having female leadership has made a real difference. However, it is clear that diverse leaders with different experiences and skills increase the chance of new ideas and ways of working emerging within unions.

5.3.3 Member Expectations and Engagement

Compared with manufacturing unions in their respective countries, unions' membership density in the education sector is relatively high. However, cognisant of the risk of losing large numbers of members when teachers enter retirement, unions have also made increasing efforts to target youth in their recruitment drives.

Unions' operating environment has shaped – and quite significantly – their strategies to recruit and engage members. Recruitment of members is undertaken mostly through direct approaches through teachers at school level, or among trainee teachers at university, or through specific recruitment drives. It also takes place through social networks involving either colleagues or family. Members join because the union provides a service that they need (such as health insurance), connects them to colleagues (sporting events, etc), because the union has secured a policy win that has had a direct impact on teachers, or because officials have assisted an individual teacher.

The key issue for unions is not so much union density but how unions engage with members and what this transformation of strategy enables them to achieve. Hostile governments, education privatisation and commercialisation and education system reforms have each influenced what unions can hope

to achieve in the policy arena, and also in industrial matters. For example, while Fiji has a high level of membership across both the FTA and the FTU, many teachers are reluctant to participate in industrial action because they fear losing their public sector jobs. In the past, the Ministry has stopped union deductions from teachers' salaries in response to strike action. Similar problems have been experienced in some other countries across the region, most notably the Philippines, where ACT and their members are 'red tagged' as a Communist front. However, political, social, and economic context shapes, but does not fully determine, the strategic orientation of unions, or members' expectations of them. Unions retain considerable agency even in the most difficult situations.

Across the eight countries, members have varied expectations of their unions. In situations where unions have actively worked to implement leadership reform and open two-way dialogue, members' expectations extend beyond service delivery. In countries where unions are constrained by government, and by their own internal structures, members mostly engage with unions as service delivery and community welfare organisations.

This focus on welfare shapes the expectation of the union as a service provider, leading to a disengaged membership. One union member in the Pacific told us that in the first seven years of his membership he had never been contacted by the union or invited to attend a branch meeting. The only reason he had retained his membership was to access welfare benefits. Another member of another Fijian union said that only a very small percentage of members perceived that a core function of unions was to fight for workers' rights and enhance the quality of education instead, members joined to access insurance, loans and participate in sporting competitions. This is not to suggest that mutual aid is not a legitimate domain for unions – especially recalling their genesis in mutual aid associations – but that there are risks in positioning it as a union's primary focus.

Another challenge that teachers' unions face in terms of member engagement is effective communication. As Bascia and Stevenson (2017: 60) observe:

> *Given the pressures on teacher workload, many teachers are not persuaded that long hours in a formal meeting are a good use of their scarce time. However, less formal structures which may be focused on specific issues relevant to specific teachers can be more successful in encouraging engagement … creative use of social media [can serve] as an organising tool, not simply as another way to present union messages, but as providing fora and 'spaces' where self-organising can flourish.*

Until recently, many of the teachers' unions in the region relied on very traditional means of communication, such as print-based newsletters and formal correspondence that trickles down (or not) through the different levels of the organisation. Where unions favour welfare, union leaders tend to

continue to engage in these very traditional ways. One union branch official in Fiji commented:

> *We can pass on the information to them in branch meetings. That's the only mode that we can gain access to our members. Only through branch meetings. There is no other mode of communication in our structure that enables us to communicate with members.*

Similar patterns of member communication were present in Malaysia, where a one-way flow between unions and members dominated interactions.

Elsewhere, some unions had already embraced social media and other forms of digital communication before the COVID pandemic hit in 2020. The pandemic has accelerated the spread of these technologies, which have the potential to increase authentic member engagement. It is important to note here that digital communication is not always a panacea. In one country, the uptake of social media was identified as posing a professional and personal risk to officials and members. In addition, a shift to digital communications continues to exclude the most disadvantaged union members. In India, for example, the digital divide is palpable: those in technology-focused cities are able to make full use of the internet and technology to increase communications between provinces and national leadership, and provinces and their members, but those in rural localities suffer the double burden of not being able to travel to meet during the pandemic, and not being able to access information technology to plug this gap. Similarly, while digital services potentially lessen the tyranny of distance in the small island states in the Pacific, different levels of access can further entrench existing barriers to information access.

There is also a question of the *quality* of communications. Many union officials discussed in detail their efforts to communicate information to members, yet few spoke of two-way dialogue between leadership that intentionally seeks to create opportunities to listen, learn, and act on members' interests. All unions involved in the study had established face-to-face forums to communicate with members, during which members could offer their views and opinions to union officials, but only a small proportion of members attend these meetings. In some contexts, branch meetings were held infrequently. Again, digital technologies, and social media in particular, has the potential to help bridge this gap. As one ACT official reported:

> *In the time of social media, all teachers have access to information. Before, they only just read our memos, but now they can directly engage, comment on posts, or bombard our inboxes with different concerns. We are reading that and validating that through our union leaders. But I can say it's very democratic. In fact, members can be very demanding on social media–they ask what our stance is, about what are we doing.*

Even if imperfect, this technology is available to unions throughout the region; the question is, why only some of them are using it to maximum effect?

What distinguished countries that were further along the renewal journey was the unions ensuring that members were engaged and consulted. There are three key factors to this. The first is *creating multiple and innovative forums* through which members can engage. For example, PGRI has developed an app giving members access to different union services. This includes requests for individual IR support, goods and services discounts, and dues payment. They have also developed a programme of online professional development seminars and WhatsApp groups for members to contact union officials. India is another country where some teachers' unions have embraced the use of digital technologies to enhance the impact of their campaigns. In Haryana, one AIPTF affiliate used digital channels to boycott the imposition of online training courses for teachers through NGO-developed apps, mobilising members and disseminating information through social media platforms: 'We used social media like a weapon. We use it more and more,' a representative of the affiliate said.

The second involves *more engaged leadership*. In Vanuatu, a young woman took over as branch president in Port Vila. As a result of her efforts, and in particular her engagement with the School Association and School Branch Executive, this branch went from being the least active to the one with the most members across the country. Similarly, young female leaders in one state of India developed union strategy with a diversity lens, which led to them targeting female school heads – women hold the majority of these positions – as key influencers in education:

> ***Our target is the head teacher. We are trying hard to add head teachers to our union. Most of them, I think 80 to 85 percent of head teachers, are females. We are organising a programme to facilitate them and give them momentum … If we are commanding the head teachers, then we have command on the whole school, actually.***

The third is building *trust between officials and members*. A key finding that emerged is that members need to trust the leadership, and the leadership need to trust and be open to the opinions and ideas of members. One part of this is accessibility of leaders to members, and not just at monthly meetings and events. In Indonesia, the PGRI's current president, also a woman, has a WhatsApp channel through which members can contact her at any time. Although managing this channel is incredibly time-consuming, it allows her to develop personal relationships with members across the archipelago and, in doing so, gain insight into members' struggles. She then communicates these members' stories through PGRI's other digital channels, which makes other members feel like the central leadership cares about them as individuals.

Trust is, of course, not just about accessibility. It is also about accountability and transparency. In the FTA and the VTU, there had previously been serious

issues with union accountability and transparency. New leadership came on board, rectified the issues, and membership numbers increased rapidly. In these cases, trust was built by undertaking a process of reform within the union and bringing members along on that journey.

5.4 Current Understandings of Renewal

Since union renewal is a purposeful activity, it is necessary to consider union officials' current understandings of it, and the limits of those understandings. As defined by EI in its 2019 Resolution on Education Union Renewal: The New Imperative, renewal is 'a process of transformation' through which unions are revitalised (EI 2019c). Features of union renewal identified in this resolution include:

- Connecting with union members and 'drawing them into activity', in order to convert unions 'from mass membership organisations to mass participation organisations'.
- Improving the participation of under-represented groups (including young people and women) in activism and responsible positions.
- 'Re-thinking union structures to create more inclusive and participatory organisational cultures and giving members multiple ways to engage with the union by reflecting their diverse interests and identities'.
- Making the union present in the lives of members by building union capacity in workplaces, so 'members can experience their union making a real difference for them in their work'.
- Finding 'creative ways to organise around professional issues so that unions act for educators across all aspects of their work, industrial and professional'.
- 'Turning unions outwards into campaigning organisations that not only 're-frame the narrative' on key issues, such as education funding, but build broad alliances with students, parents and civil society organisations.

Perhaps reflecting the recentness of this Resolution, union renewal is a relatively new concept for the activists and members we interviewed, resulting in different understandings of union renewal. Some described it as a process of 'rebuilding, revitalisation, and transformation' or, 'union-building'. Those that had been actively thinking about renewal for some time described it as different ways of engaging with members, and strong leadership:

> *EI uses the term renewal. We use the term* pembaruan *[this is a direct translation of renewal]. Since I became the president, we've talked about renewal in each of our evaluation and planning meetings. We know that having a lot of members doesn't guarantee that we will be strong. First,*

> *we need to change the mindset. We need to serve our membership. This is very hard work. Then we need a clear vision from the leadership at all levels. How can it be that some districts can collect dues and others won't? It's about leadership (PGRI, Indonesia).*

In most cases, however, the ways in which unionists described union renewal was couched in terms of increased member recruitment and greater engagement with women and youth. As one unionist commented, 'Union renewal means how we can invite young members/teachers to the unions.'

Despite this narrow understanding, in the course of our discussions many of the unionists we spoke to described other activities that fall into EI's definition of education union renewal, including an expansion of their approaches to member engagement, building union capacity in the workplace, and strengthening their focus on professional issues. As noted earlier, some unions (notably in Malaysia and Indonesia, but also in Fiji) saw an expansion of their incidental consumer benefit offerings as a key part of union renewal.

6. A Possible Model for Education Union Renewal

In developing a possible model for union renewal in the education sector, we adapt Frege and Kelly's (2003) model to take account of the triple role that governments play as a source of social policy, the arbiter on industrial relations issues such as disputes resolution, wages, and employment conditions, and as the sector's main employer (Figure 2).

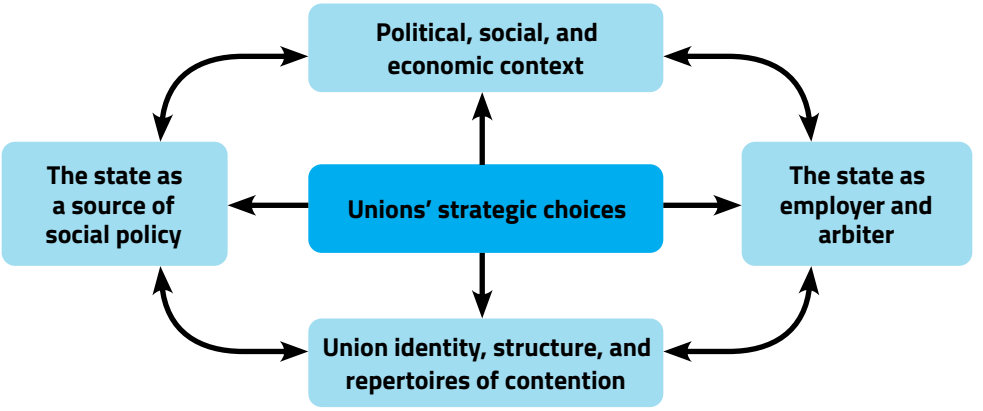

Figure 2. **A possible model of union strategic choice for education union renewal**

We make further modifications to recognise the dialectical relationship between unions and the state in these various domains, as well as the interplay between political, social, and economic context on the one hand and union identity, structure, and repertoires of contention on the other.

At the core of this proposed model is the premise that, even in the most difficult of circumstances, unions maintain a substantial degree of agency and, therefore, the capacity to make strategic choices. The question is how to ensure that the choices unions make serve not only their immediate interests, or as a knee-jerk response to immediate threats, but contribute in substantive and long-term ways to teachers' well-being as workers and professionals, and also to the quality of education available to pupils and, indeed, to the broader domain of social policy.

Having considered the social, political, and economic contexts of unions in the region, and the role of the state as the primary source of social policy – as well as arbiter and employer – it is necessary, as Bascia and Stevenson (2017) argue, to turn inward and look to union structure, identity, and repertoires of convention

as the primary sites at which teachers' unions can work towards renewal. The discussion that follows examines each of these in turn.

6.1 Union Identity

There are two clear questions about teacher union identity in the Asia-Pacific: what do unions want to be and to do? and can they achieve these aspirations in the particular political, social, and economic context in which they operate? As the Malaysian and Fijian experience attests, it is quite possible to serve as thriving mutual aid associations in politically difficult situations, but is that all that union officials (and members) can hope for? It is important to recognise the impact of government hostility – although not all the eight countries have governments that are as antagonistic towards union activists as in Fiji or the Philippines, none are completely open to unions – but it is also important to consider ways, within existing constraints, to pursue long-term policy objectives that support the pursuit of members' interests as workers, as professionals, and as members of the wider community. A clear *narrative* around that union identity and purpose is vital for strategy formulation, as much as for creating a sense of collective identity and belonging among members.

6.2 Union Structure

There is also a question of how teachers' unions operate as organisations, and whether changes are required to better meet the challenges of our times. Two key elements are worth considering here: (a) where the critical mass of union activity sits, and (b) what the strategic intent of that activity is and how well it serves the interests of members. The precise nature of that strategic intent depends on an individual union's identity and purpose.

In terms of the *location* of union activity, the primary distinction sits between union officialdom and the membership. For many decades, the balance in the teachers' unions we examined was skewed towards officialdom, sometimes with little more than lip-service being paid to the base. Union officials play a strategic role along with taking responsibility for engaging with external interlocutors, but their *raison d'être* is to serve the membership, which is only possible if they truly understand members' situation and interests. The need for better member engagement is now widely accepted as a core tenet of union renewal, especially in the face of employer and government hostility.

The focus on member engagement as a renewal strategy has its roots in the so-called 'organising turn', which emerged in the US and Australia in the mid-1990s and has since gained traction not only in different national contexts but also

within the international labour movement. As Heery (2015: 546-47) notes, the organising model has three main features:

- It is 'neo-syndical' in focus insofar that it focuses on 'building up the internal power resources of trade unions', with a particular focus on 'strengthening workplace organisation and fostering a capacity among members to act collectively'.
- It has in large part been an 'attempt to 'organise diversity' (with a focus on women, ethnic and other minorities, migrant workers, workers in precarious employment), often using non-traditional organising methods.
- It is a strategy that, while bottom-up in its focus, is in fact most often top-down in the sense that it is generally 'initiated by union officialdom, often at the very peak of national trade union movements'.

Most of the union officials we spoke to recognise the importance of building the base as a renewal strategy. As noted in Section 5.3.2, most have also made attempts to better accommodate membership diversity, targeting women and younger members in recruitment drives and making space for them in the union structure. Several of the teachers' unions we engaged with have made considerable progress on this front. In some unions, moreover, traditionally under-represented cohorts have stepped up and begun to make a difference. As noted earlier, younger members grew tired of the unwillingness of national level leaders to focus on the issues that affected their generation and began running for elected union positions themselves. Efforts to reach out to precarious workers are less common, though in Indonesia the PGRI has made quite a strong attempt to reach out to honorary teachers. The next step for union transformation is to engage more systematically with these diverse voices and opinions, and to incorporate them more fully in strategy formulation. As one union leader commented, 'The union requires leaders that can adapt to change and respond to teachers' needs.'

Digital technologies, social media in particular, have proven to be invaluable in promoting two-way communication between officials and members, as well as in the provision of professional development, and can be further exploited. This trend was already evident before onset of COVID. However, the pandemic has not only confirmed its utility but also increased its reach, as more union members–and officials–are forced into the digital world. As PGRI's vice president told us, 'Whether they like it or not, our grassroots leaders have had to get used to technology. The organisation is now turning into a digital organisation.' However, engagement at the school and community level also remains critical in transforming passive members to active participants, and there remains much that can be done on this front. In addition to problem-solving on industrial issues, schools and districts can be sites for ongoing and context-responsive professional development, as well as for social justice initiatives. As such, they not only provide an opportunity to develop a sense of dynamism but can also help 'shift the moral center for member engagement', and enhance teachers' unions' 'moral legitimacy', as Popiel (2013) suggests.

Activating the workplace in this way creates pathways for greater democratic engagement within the union and for grassroots members to develop leadership skills. But this work is not easy. On the one hand, it is more resource-effective to run activities locally, as it avoids the need to expend large sums on transport and accommodation. Professional development and union-building activities are also more likely to have a lasting effect if they are embedded in a specific local context. On the other hand, an effective local programme requires motivation, expert support, and ready-to-use, self-contained materials that do not require extensive trade union training experience or deep knowledge of content for implementation.

District union structures (or their equivalent) are best-placed to provide school-level support. The question is, how to empower them to do so, and to motivate them to maintain high levels of engagement? One possible model is that adopted by ACT, whose efforts to recruit and educate pre-service teachers have provided the building blocks for the development of dynamic and effective leadership in selected branches. This has, in turn, helped school-level union leaders to gain opportunities to participate in professional development programmes as well as workplace grievance committees. In addition to contributing to these activities through regular school visits, the union's central leadership responded to member feedback by developing an awards programme that recognises its most active school chapters and most active chapter presidents. Such activities require human and other resources, which are most easily accessed by unions with a strong financial base underpinned by regular dues collection. And, the more relevant the union activities are to members, the more likely it is that they will happily meet this commitment.

6.3 Repertoires of Contention

Efforts to increase union membership and member participation, develop members' capacity as professionals and unionists, and help them mesh their professional and union identities are vital components of teacher union renewal. But so are the strategic choices that unions make about their repertoires of contention. Here, local context becomes even more salient, as the relative costs and benefits of different repertoires is very much determined by the political, economic, and social climate in which unions operate.

Ultimately, a teacher union's role is a political one. For all teachers, public and private, the nature and visibility of education as a public good means that the relationships they have with the government in its capacity as the source of social policy, and with the community, as providers of education and as citizens, opens some repertoires of contention while closing others.

As noted earlier, when it comes to labour relations, public school teachers and their organisations face an added layer of complexity, since the government

is simultaneously employer and arbiter. These sectoral characteristics force teachers' unions to tread a fine line in their relationship with government, balancing the benefits of collaboration and partnership with the need to maintain their independence. Achieving this balance is particularly challenging in contexts where the government does not recognise unions as legitimate and independent actors.

Many of the union officials we spoke to emphasised the need to work with government to advance teachers' industrial and professional interests. In several cases, they felt that they had lost their seat at the table in the past decade or so, as a result of a shift towards a more neoliberal approach to education. Others had worked hard to stay involved. As the Vice President of PGRI reported, 'Our regional officials engage intensely with local government. We tell them that PGRI is a strategic partner of the government, from the central government to the regions. This means we criticise, but we don't pass judgement.'

However, few had thought through what measures – internal and external – were required to achieve the momentum necessary to reassert themselves, let alone to change the rules of the game. A particular risk in this regard is that unions 'take a narrow perspective', and in doing so, 'fail to develop the linkages, alliances, and broad reform vision' required to build political power (Turner 2004: 3). Often, campaigning was considered by union leadership as a one-off event, rather than as a coordinated strategy involving multiple actors and multiple repertoires of contention, to influence policy or regulatory reform. Unions typically were very good at running such events, but there were few, if any, examples of an actual campaign that had been able to achieve substantive policy wins outside the domain of labour relations.

Partnerships with community and social movement actors on education and social justice issues are one way to build that power. Stronger relationships with allies within different levels of government is another. These kinds of relationships take energy and resources to develop and maintain, so unions have no choice but to be selective.

Campaigning is also a key tool in this respect. As unions have shown in many different contexts, structured campaigns provide a way of focusing their energy on a clearly defined issue, thus increasing the likelihood of impact, and also generating a sense of organisational efficacy and momentum. They provide a sense of purpose to partnerships and a way of 'learning by doing' for different levels of the union, so often absent from programmes designed to build capacity.

Once again, a clear sense of union identity is vital, both in identifying priority issues and in communicating the importance of those issues, to members.

7. Conclusion

While union renewal as a term is yet to be embraced by teachers' unions in Fiji, India, Indonesia, Nepal, Malaysia, the Philippines, the Solomon Islands and Vanuatu, each of the ten unions we engaged with had made an effort, and achieved some progress, in union renewal in one or more domains – whether it be in strengthening one or more element of internal structure or in the ways to pursue teachers' interests as workers, professionals and citizens. It is also evident that particular unions have different strategic orientations and uneven capacity across different union functions. For example, some have very well-developed welfare arms, while others have honed specific technical expertise. Others still have advanced capacity for public campaigning but lack some of the basic elements required to build strong worker organisations.

As Bascia and Stevenson (2017: 3) observe, the work of union renewal is 'long, slow and often difficult', but also deeply embedded in local context. Despite this, and while the different teachers' unions examined in this study have different levels of experience when it comes to union renewal, some common challenges remain. One of these is the challenge of developing a clear and consistent narrative about union identity and purpose that is responsive to members. A second is to find ways to harness that narrative to guide and prioritise union work in various domains, while identifying ways to move beyond case-based support for individual workers and *ad hoc* programming towards more systemic solutions. A third is to develop more productive ways to engage with often hostile governments while maintaining organisational independence and integrity.

In order to overcome these challenges, it is vital to build a union that is more responsive to the interests of its members, more relevant to the teaching profession, and better equipped to tackle the realities of the education sector in the 21st century. This requires a leadership that reflects the membership – in terms of demographics, but also values and priorities – and which has the skills and resources to inspire and mobilise it. It is only then that unions will be able to develop the political and industrial power they need to (re)assert themselves as strategic actors in the education sector.

8. Recommendations

Guided by our analysis of the current situation and our proposed model for education renewal, we make the following recommendations. In addition to continuing to strive to be more inclusive and effective as organisations, we suggest:

1. That teachers' unions take the opportunity to reflect on, and clearly articulate, their purpose and identity as 21st century organisations. This task should be undertaken in ways that provide members with an opportunity, and encouragement, to participate in a structured process of reflection. This discussion could be facilitated at the school level and through social media, and should focus on:
   a. What members perceive to be the union's identity and purpose at the current time and what would they like it to be; but also
   b. What specific policy issues – in terms of professional, industrial, and social justice issues – they would like their union to focus more closely on.
2. Having gone through this exercise, teachers' unions could then:
   a. Formulate a clear narrative about their identity and purpose; and
   b. Rank the specific policy issues that members have identified in terms of their potential impact on social policy and teachers' industrial and professional well-being, the feasibility of effecting change, and what success would look like.
3. Taking care to undertake further consultation with members, officials could then select one policy issue that is both important and able to be addressed. The results of this process can be used to develop a targeted and time-bound campaign with clearly identified target outcomes, either at a whole-of-union level or in a particularly active branch or branches. Depending on the issue, this campaign could involve a diverse range of tactics including engagement with government and the community, but also member- and school-focused initiatives.
4. Participating unions use this campaign as a laboratory for identifying aspects of union structure and process that need honing (for example, channels for member engagement, embedded capacity and leadership development, and resourcing) but also new ways to engage with external interlocutors.
5. Participating unions apply these insights across the day-to-day work of the union, and repeat the process, either to ramp up the gains made in regard to the issue targeted in the first campaign, or to identify another target issue.

A key mechanism for the achievement of these goals is through the development of various EIAP-supported virtual communities. These communities could provide a forum for sharing participants' experiences and generating a sense of shared purpose and community. They could also be used to engage with experienced campaigners from teachers' unions in other countries; help structure data-seeking exercises, as participating unions reach out to their membership; and provide a sounding board on selection of issues, campaign strategies, etc; also as a brains trust for problem-solving over the course of the campaign. These groups could be formed around defined campaign domains after individual unions have had an opportunity to determine their internal priorities. It would be important to restrict the number of participants in each to 4–6 individuals (perhaps drawn from 2–3 unions) to ensure that they function effectively as a locus of exchange.

9. References

Bascia, Nina (ed). 2015. *Teacher Unions in Public Education: Politics, History, and the Future*. New York: Palgrave Macmillan.

Bascia, Nina and Howard Stevenson. 2017. *Organising Teaching: Developing the Power of the Profession*. Brussels: Education International.

Basilio, Raymond. 2019. Philippines: On Persecuting Teachers and Weaponizing Education. *Worlds of Education*. Available at: https://www.worldsofeducation.org/en/woe_homepage/woe_detail/16578/%E2%80%9Cphilippines-on-persecuting-teachers-and-weaponizing-education%E2%80%9D-by-raymond-d-basilio.

Brogan, Peter. 2014. Getting to the CORE of the Chicago Teachers' Union Transformation. *Studies in Social Justice* 8 (2): 145-164.

Chambers-Ju, Christopher. 2021. Adjustment Policies, Union Structures, and Strategies of Mobilization: Teacher Politics in Mexico and Argentina. *Comparative Politics* 53 (2): 185-207.

Compton, Mary and Lois Weiner (eds). 2008. *The Global Assault on Teaching, Teachers, and their Unions*. New York: Palgrave Macmillan.

Crossley, Michael, Cresantia Vaka-uta, Roasiana Lagi, Simon McGrath, Konai Thaman and Ledua Waqailiti. 2017. Quality Education and the Role of the Teacher in Fiji: Mobilising Global and Local Values. *Compare* 47 (6): 892-890.

EI. 2019a. Annual Report 2019. Tabled at the EI Asia Pacific Regional Committee Meeting, 1 – 2 February 2020, Kuala Lumpur, Malaysia.

EI. 2019b. Philippines: Anti-union Repression against Teacher Union. Labour start campaign. Available at: https://www.labourstartcampaigns.net/show_campaign.cgi?c=4225.

EI. 2019c. Resolution on Education Union Renewal: The New Imperative. Available at: https://www.ei-ie.org/en/detail/16461/resolution-on-education-union-renewal-the-new-imperative.

EI. 2017. Regional Report. Tabled at the EI Asia Pacific Regional Committee Meeting, 15 – 16 November 2018, Kuala Lumpur, Malaysia.

EI. 2014. Regional Report. Tabled at the EI Asia Pacific Regional Committee Meeting, 25 – 26 April 2015, Kuala Lumpur, Malaysia.

Ford, Michele. 2020. Bucking the Trend: Union Renewal in Democratic Indonesia.' In *Trade Unions and Labour Movements in the Asia-Pacific Region*, edited by Byoung-Hoon Lee, Sek-Hong Ng and Russell Lansbury. Abingdon: Routledge, pp. 131-147.

Ford, Michele and Abu Mufakhir. 2013. External Evaluation: Support for PGRI in its Efforts to Develop as an Independent Trade Union. Brussels: Education International.

Frege, Carola and John Kelly. 2003. Union Revitalization Strategies in Comparative Perspective. *European Journal of Industrial Relations* 9 (1): 7-24.

Frege, Carola, and John Kelly, eds. 2004. *Varieties of Unionism: Strategies for Union Revitalization in a Globalizing Economy*. Oxford: Oxford University Press.

Grenier, Jean-Noël and Patrice Jalette. 2016. Austerity as an Opportunity for Union Revival: Québec Public School Teachers. *The Economic and Labour Relations Review* 27 (1): 64-80.

Heery, Edmund. 2015. Unions and the Organising Turn: Reflections after 20 Years of Organising Work. *The Economic and Labour Relations Review* 26 (4): 545-560.

Ibsen, Christian, and Maite Tapia. 2017. Trade Union Revitalisation: Where are We Now? Where to Next? *Journal of Industrial Relations* 59 (2): 170-191.

ITUC. 2019. Philippines: Government Crackdown Targets Unions. Available at: https://www.ituc-csi.org/philippines-government-crackdown.

Murray, Gregor. 2017. Union Renewal: What Can We Learn from Three Decades of Research? *Transfer: European Review of Labour and Research* 23 (1): 9-29.

Peterson, Bob. 2014–15. A Revitalized Teacher Union Movement: Reflections from the Field. *Rethinking Schools* Winter: 13-19.

Popiel Kara. 2013. Teacher Union Legitimacy: Shifting the Moral Center for Member Engagement. *Journal of Educational Change* 14: 465-500.

Poudal, Chandra. 2015. Neo-liberal Educational Reform and the Role of Teachers' Unions in the Context of Private Schools in Nepal: Possibility or Paralysis? *Policy Futures in Education* 13 (4): 546-558.

Rose, Michael 1993. Trade Unions – Ruin, Retreat, or Rally? *Work, Employment & Society* 7 (2): 291-311.

Turner, Lowell. 2004. Why Revitalize? Labour's Urgent Mission in a Contested Global Economy. *Varieties of Unionism: Strategies for Union Revitalization in a Globalizing Economy*. Carola Frege and John Kelly. New York, Oxford University Press: 1-10.

Stevenson, Howard. 2005. From 'School Correspondent' to Workplace Bargainer? The Changing Role of the School Union Representative. *British Journal of Sociology of Education* 26 (2): 219-233.

Stevenson, Howard. 2015. Teacher Unionism in Changing Times: Is This the Real 'New Unionism'? *Journal of School Choice: International Research and Reform* 9 (4): 604-625.

Appendix A: Fiji Case Study

Fiji gained independence from Great Britain in 1970 and since that time has experienced three coups, the latest being in 2006. This has led to a high degree of political instability and an increasingly repressive government. The current Prime Minster, Bainimarama, stepped down from his role as Chief of the Military to contest the 2014 election, which he and his party (FijiFirst) won. Laws are in place to ban reporting that is critical of the government or harmful to 'national interest and public order'. Protests and strikes are prohibited by the Constitution. Union members are not permitted to be members of parliament, thus limiting opportunities to pursue a union agenda through a political party. Union leaders are under constant surveillance by the government and are subject to arrest and detention.

Education policy is highly centralised. A National Curriculum Framework was put in place in 2013 after a lengthy design and consultation process. Indeed, the education system in Fiji has experienced rapid and large-scale reform in the area of policy, curriculum, and assessment (Crossley et al. 2017). In addition, it has been affected by World Bank-led public administration reforms in the past five years, including moving the entire civil service to fixed-term contracts. These challenges have led to an unstable and constantly changing environment for teachers and students, with issues remaining in terms of student-teacher ratios and quality infrastructure.

Union structure

Fiji has two key teachers' unions: the Fiji Teachers Association (FTA) and the Fiji Teachers Union (FTU). FTU was established in 1929. Some 35 percent of its members are indigenous Fijians. The remainder are drawn from the other ethnic groups. The FTA – initially named the 'Native Teachers Association' – was formed in 1934. Membership is now ethnically more diverse; however, membership is mostly indigenous in some branches.

The FTA has 17 union areas, each of which contains two to three branches. In total, there are 87 branches with an elected President, Vice President, and Treasurer. In addition to elected Branch leaders, it has area representatives who provide support to several branches to organise and recruit members, and coordinate union activities. The FTU has 16 branches at the district level. At the branch level there is an elected group of 10 executive members in each branch. In addition, each school has an appointed union representative. At the headquarters, there is a national elected board that meets monthly. The national executive of the union, which includes representatives from all 16 branches, meets quarterly. The FTU has a women's wing and the FTA a women's network.

Leadership and organisational culture

In 2018, the FTA elected a new national leadership, which implemented numerous changes to enhance financial management and accountability within the union after some previous financial mismanagement. It has worked to rebuild its membership base since that time – both in terms of numbers and trust. The FTU leadership has been in place for several decades, since 1999. There is a culture of centralised decision-making. For example, the General Secretary attends branch meetings to provide information about new government policies. This level of engagement was considered to be a key union attribute, with key leadership positions the 'face' of the union, at the branch level at least. However, at the school and branch level there is a degree of disconnect with the membership.

Presidents and General Secretaries of both unions are male. The Vice Presidents of both unions are female. Seven of 22 positions on the FTA's national board are held by women, but only one of its area representatives is a woman. Of the FTU's 13 Executive Committee members, six are women. FTU officials commented that they are working hard to achieve gender equity in the national and branch leadership. Currently, 30 percent of leaders are women with some mandated, compulsory positions reserved, including the national Vice President. The head of the woman's wing of the union holds a seat on the national board.

Membership profile and dues collection

The Fijian government employs 13,000 teachers across the country. The FTA has 4,300 members, while the FTU has 5,000 members. The combined membership of the unions accounts for 71 percent of the teaching workforce. The FTA has seen a considerable increase in its membership from 2018 (when it had 3,200 members). In the same period, the FTU's membership has increased steadily. Teachers are not permitted to be members of both unions; however, there is some movement between the two. FTA members reported that a large proportion of their members were located in rural areas, which are difficult to access. The FTU has a large membership base in urban areas, particularly in Suva.

Government resistance to unions had a direct impact on membership numbers, and on the attitudes of particular groups of potential members. Informants reported that young teachers are concerned that if they join the FTA or the FTU they will not be appointed by the government to a teaching position. Officials from both unions suggested that a lack of engagement from the government and negative public sentiment influenced their ability to effect policy change, and thus were important barriers to increasing membership.

Membership dues are set at FJD 10 per fortnight for FTA and FJD 7 per fortnight for FTU. Dues are deducted from teachers' salaries with their authorisation. Additional fees are payable for services such as medical insurance. A high number of members of both unions regularly pay dues.

Recruitment

The two unions differ in their approaches to recruiting new teacher graduates. The FTU goes to the teacher training institutions before graduation. As one informant reported, 'We address the graduating students. We get them to complete the enrolment forms. Once they start teaching, we are able to get them into the system.' The FTA does not do this, though members recommended that this would be a particularly good strategy.

FTA has engaged in a membership drive following the appointment of its new General Secretary at the end of 2018. In late 2020, the national executive visited members across 70 percent of the country, sending invitations to non-members to attend these meetings. This recent membership drive resulted in the recruitment of 200 new members. Outside of membership drives, the FTU also organises cluster meetings with the schools in the evening, where non-members are invited to come to listen and see if they are interested to join, as well as attending professional development activities to promote the union to non-member participants.

The unions' extensive welfare services are a key way of attracting new members. As one branch official commented, 'We invite teachers that aren't members to join our workshops, which explain the welfare scheme. Then we advise them about what they need to do. We don't just talk about fighting for your rights, not just about how we will help them if you are in trouble with your employer.' A focus on sports has also been critical for the union in attracting members. Teachers join union-coordinated sporting competitions because they provide an opportunity to engage in social activities with their teacher peers. Indeed, there was a general perception among those interviewed that, while different people joined the union for different reasons, overall members tended to join either for welfare services or these sporting activities. One informant estimated that only 20 percent or so of members viewed the union as a critical representative voice for teachers' rights and interests.

Another more recent change in strategy to recruit members is to attract younger teachers (under 35 years of age). Now, around half of the FTA membership is youth. Sports has been a key attraction for members, and particularly those who are younger. 'We have a sports day for the Western division members, where districts have volleyball teams, soccer teams, netball teams. Women and everyone get together like it's a carnival. You are not talking union.' FTU has also worked to bring in younger members, and has a strong youth presence in some branches, with up to 80 percent of the membership under 40 years of age in some cases. As one Suva-based official commented, 'There are a lot of young teachers who are in our locality, and therefore we are able to work with them in many activities; for example, advocating on the purpose of joining trade unions. Celebrations are important; for example, getting youth in sporting activities.'

Engagement with members

Engagement with members is affected by three key issues – geography, union culture and unions' relationship with government. Within both unions there was an acknowledgement of the need to make inactive members more active, with youth being a key target. Sporting competitions and social activities were identified as a key strategy for bringing young members into the union.

One of the challenges in engaging more systematically is related to the country's geography. Fiji is made up of 300 islands and many schools are difficult to access, requiring long trips by boat. This geographic dispersion has a direct impact on union organising. Indeed, one of the key issues identified at all levels was the difficulty of engaging with members in remote areas, which is both costly and time-consuming. Branch-level officials sought to maximise the impact of long trips by boat, requiring them to stay overnight, with some saying that these extended stays produced a different level of member and community engagement. On the other hand, such lengthy journeys resulted in low levels of face-to-face communication between branch reps and members in rural areas. As the majority of members are based in these areas, addressing this issue must be a critical concern for FTA and FTU in their renewal agenda.

Across the board, more formal communication with members tends to be a one-way flow of information. The FTU distributes a comprehensive quarterly newsletter to members outlining union services and achievements. Both unions have fifteen-minute radio broadcasts every Sunday and also use print media and email. Branches are the main conduit between the members and the union. Each branch hosts activities run by the area representative and the branch presidents in and around their locality. Branch-level meetings are the primary forum where union-member interaction occurs, and this is often the only opportunity for engagement. According to one branch official:

> *We can only use the tools that we have … we can pass on information to them in branch meetings. That's the only way we can gain access to our members. Only through branch meetings. Apart from that, there is no other mode of communication in our structure that enables us to communicate with members.*

However, not all members attend meetings, with roughly 50 percent of membership in attendance – and often the same members at each meeting. As one member commented, interaction between branch officials and members very much depends on how active the branch representatives are:

> *I have a school nearby that I am also in charge of. The branch rep had to disseminate to members, but which he hadn't distributed. So, I asked the head to change the branch rep, because we need someone who is more active.*

To mitigate this, the national executive attends branch meetings and activities on a rotating schedule. Their attendance at these meetings is supported financially by the union, as this is seen as a key mechanism for members to engage.

Opportunities for members to provide feedback to union officials regarding strategy, or areas for greater focus, are given in allocated question-answer time in branch meetings. Officials also pointed out that activity evaluation forms have a section (on the back of the form) for members to provide suggestions, and inputs into how the organisation is run. The selection of topics for seminars is a key example of both unions' top-down approach: 'The branch level decides on the programme, looking at what is affecting the country, the union. Then our headquarters, our executive, decides what is to be taken to the members.'

One strategy adopted by both unions to increase participation in union meetings and events was payment of a per diem to cover time and transport costs. This ranged from FJD 10 per event to FJD 40 per event. Several respondents commented that people would be unlikely to attend events if they did not receive an allowance. 'When we started paying this little amount of allowance, a lot of people joined. We had meetings where we had two-hundred plus people attending.' The two key reasons identified for low turnout rates prior to the introduction of an attendee allowance were family commitments (especially for female members) and fear of being associated with the union (government harassment).

It is notable that social media has not been used by the union as a communication tool. Following the dismissal of some members for posting negatively about the country's President, teachers have been strongly advised by the FTA, including in newsletters, not to post on social media during school hours or about the government. The union does use social media to provide information to members about activities. 'They will understand that we are fighting for workers' rights, stability, security. Not only Facebook but Instagram and other ways are there to popularise the union. We won't mention anything against the government,' said a union official.

It is clear that government hostility towards both unions has prevented a higher degree of member engagement. In some cases, it has proven difficult for union officials to visit a school or to address teachers. This has been exacerbated by a new Ministry ruling that any school visitor must seek advance permission from the Permanent Secretary.

As the General-Secretary of one union commented: 'There have been occasions where some of the leaders wouldn't want to be seen with me in public. Some of them are our members but they don't come to our office, even when they need to ask for assistance.' Both unions have worked to circumvent this obstacle by holding union activities outside schools.

Key achievements identified by the leadership

Both the FTA and the FTU identified several common achievements. These include the establishment of a comprehensive suite of welfare services to support teachers in and outside of work, and fostering a deep and extensive community focus. Both unions commented strongly that the union was not only there for teachers, but also their families and the wider Fijian society. Both unions have managed to achieve this despite a repressive and highly constrained political environment.

A further key achievement identified by the FTA's leadership has been its capacity to rebuild following its loss of registration. As one official observed, 'People thought we didn't have strength. But that wasn't the case – it was the way that our system was working. But then we came back, and now we have been able to gain new members.' The FTA is also very proud of its efforts to increase women's participation in the union leadership. The General Secretary said that the achieving of close to 30 percent representation of women on the national committee was 'historic for FTA'.

Key challenges identified by the leadership

Officials at all levels of both unions identified the current political landscape and government hostility towards unions as the main challenges facing the teachers' union movement. The arrest of union leaders, including the head of the Fiji Trade Union Congress and the FTA's General Secretary has escalated in recent years. Other measures taken by the government to undermine unions include stopping union dues from being deducted from teachers' wages (as these are paid from the government salaries of teachers) and excluding unions from key education policy and discussion fora.

It was widely noted that the Ministry refuses to engage in collective bargaining or other negotiations and that it has systematically blocked previously established consultation mechanisms that were in existence for some three decades. Previously, unions were represented in the Ministry of Education's staff board and on selection panels when heads of schools would be selected. They also took part in formulating curriculum. Since the Bainimarama government has come to power, they have been forced to take a back seat in education policy formulation and have been increasingly constrained in their operations. As one informant explained:

> *All the consultation machinery that was in existence does not exist anymore. We are not involved in policy formulation at all. And a lot of policies that had been imposed, including quite a few that we had pointed out were not going to work in our local situation because they had not been amended to adapt.*

Education Department policies opposed by the unions include the Open Merit Recruitment System (OMRS), which they believe disadvantages experienced

teachers; transfer policies; and reduction of the compulsory age of retirement of teachers to 55, which informants say has implications for retention and dissemination of leadership, knowledge, and skills.

An even more fundamental challenge has been the government's 2017 decision, in conjunction with the World Bank, to place all civil service positions on fixed-term contracts. These contracts are designed in a manner that the permanent secretary has the power to refuse to renew a contract or to terminate position holders at a month's notice without recourse. Contracts range from three to five years, with short-term contracts of up to one year. As one union leader commented, unions were not meaningfully involved in the decision-making process around this policy or its roll-out:

> *It was more like calling us up and somebody telling us what they are doing, not involving us in discussions and negotiations. And that is why we said, look, we are not going to come here like school kids and listen to you. So there has been no genuine consultation.*

One positive development from this transition was a job evaluation exercise that resulted in upwards salary adjustments – the first in 23 years.

Informants reported that in Fiji, unions are frequently referred to as 'toothless tigers' because of the limits imposed on them by the government. This reputation has affected membership, with many deciding to withdraw their membership either because the union was not able to deliver concrete policy outcomes, or because it was detrimental to their public service employment to be identified as a union member. Despite these challenges, both unions have attempted to restore their relationship with the government. 'As we negotiate with the government, we try to go slow and be polite and, you know, rather than taking the more confrontational way of doing things, we sort of just ask in a polite way.' This has included re-establishing open communication with the Permanent Secretary and the Ministry, as discussed in the following section.

Union strategies

A key strategy of both unions in response to this perception has been to enhance public engagement. Both unions provide a range of support services for teachers and their families, and have delivered essential community services during and before the COVID-19 pandemic. As the General Secretary of the FTU commented: 'The union is not here for the teachers; it's here for the nation.'

However, for both unions there has been little variation in union strategy over the past two decades. The national leadership attributed these limitations to the unpredictable and constrained political environment, whereas others suggested that it was necessary to rethink the unions' approach. According to one union member, 'The strategy hasn't really changed. I've been in the union for more than 20 years since I've been in

teaching. The same strategies are used time and again. I think there should be a change. We should have new strategies.'

Engagement with national government

In recent years, the FTA has prioritised improving its relationship with the government. Officials describe a turnaround to this situation since 2018, when monthly meetings with the Permanent Secretary and Minister for Education were reinstated. This strategy has included engaging with the permanent secretary whilst also trying to keep the line open with other senior staff in the Ministry of Education. The General Secretary of the FTU reported:

> *We get an occasional audience. Like, during this year, I had two face-to-face meetings [with the current permanent secretary]. And she has assured me that the human resource head would be coming to us for consulting because the teacher assessment policy is now being reviewed. We keep on writing and keep on trying to engage and we get that occasional consultation.*

As this example suggests, there are now at least more open lines of communication, which have brought at least some results in terms of increasing union engagement in the process. As an FTA official reported,

> *Before, any complaint against a teacher had to go through a process. Now anyone can pick up the phone and complain directly to the Minister. We asked her to return to the old [standard operating procedures], arguing that it would bring more credibility. And our request was accommodated to a certain level.*

There has been an increase in membership during this period, which FTA officials attribute to the shift to a more cooperative relationship with government. However, the FTA members we spoke to reported that many members believe that the leadership should be more aggressive in dealing with government.

The FTU has also utilised the ILO complaint process to push for legislative reform. But, while the government did amend some laws, and the process enabled unions to make use of the labour courts to address individual grievances, the right to strike has not been reinstated. These incremental wins have nevertheless enabled both unions to access redress through the labour court, with one official commenting, 'We have had a fair amount of space in the courts regarding our individual grievances of members.'

Although the unions are unable to utilise industrial action as a tactic to pressure the government, the FTU has attempted on two recent occasions to hold a member vote on possible strike action. In both cases, requests to the permanent secretary to supervise the balloting process were refused. The FTU

decided to proceed with the ballot; however, the Permanent Secretary sent a circular to all heads of schools on the day of voting, instructing them not to allow anyone to vote. Limits on the right to strike are not confined to the teachers' unions: the National Trade Union Congress has applied eight times for permits and each time has been refused without any grounds.

Engagement with the public

Both the FTA and the FTU identify the union as being for workers and their families. As such, there is a strong focus on engaging not only members but the extended household and community. Families and communities were included in union activities in rural areas, and in several cases parents of union members (who had also been teachers and union members themselves) had been a driver of their children's union membership.

The union's response to natural disasters and the COVID-19 pandemic exemplifies this public engagement. With many parents having lost their jobs, FTA set aside FJD 25,000 to provide lunches to school children at least two to three days per week, with teachers organising parents to take turns to cook. At FTU, every branch agreed to give 20 percent of its operating budget back to the national union office for distribution to areas of the country experiencing hardship.

Another example of community outreach is an FTU branch-level initiative to provide remedial classes and tutoring free of charge to students in the Suva central area. Classes are provided on Saturdays and in the union offices. As one official explained, 'We try to get our families involved in everything we do, so it's like a family union. It's not just us as workers, because they're all affected. We put bread on the table; it affects them.'

The largest campaign that FTU has been involved in focused on attempting to prevent the contracting of all teaching positions as part of the government's civil service reform. While many members did not protest, for fear of losing their government position, a march on the western side of the country saw over 10,000 people engage in protest.

Professional development

Professional development for teachers falls within the remit of the unions as well as of the Ministry. FTU workshops are generally held on weekend and are organised at the branch level, focusing on soft skills in teacher development, including the code of ethics of teachers and the professional standing of the teacher in the community. Professional development offerings also include behaviour management, class sizes, and dealing with parents and the community. Experts from the Ministry also deliver professional development workshops, particularly when new education initiatives or policies (regulations, leadership, and management) are announced by the government. Classroom

practice and pedagogy have not been a focus of professional development, with members encouraged to take up training in these areas through formal qualifications and loan support through the welfare scheme. Indeed, both unions also utilise the professional development workshops to promote their welfare schemes.

Individual grievance resolution and protection

Both unions regularly utilise the labour court for resolving labour disputes, and have a good record of winning cases. They also support teachers who are subject to disciplinary action by the Ministry without representation. These interventions led to many teachers being reinstated. A branch official told us:

> *Previously, teachers were often taken to discipline action on the spot, without being represented by anyone. But recently the union has represented many teachers found not to be guilty. They have been reinstated, and the government has allowed us to be part of that.*

This is an achievement for the union both in terms of support for members and also in its cooperation with the government.

Welfare and social activities

As noted above, the FTU and the FTA have a strong focus on welfare and financial services for their members. Both unions have established subsidiary organisations as separate business entities to provide medical insurance and financial co-operatives that offer competitive loans, including home loans. Through these business arms, members and their families can access medical treatment overseas. In the case of serious illness, members can spend up to FJD 40,000. They also receive salary assistance if a contract lapses, and housing and personal loans at competitive interest rates. These expansive welfare and social services have drawn a considerable number of members into the union. Approximately 3,500 FTA members participate in the co-operative, which represents a high proportion of the union's membership. A newly established allowance for teaching graduates taking up new posts (to cover the cost of travel and accommodation in the period prior to when the post commences) has also been a factor in the larger number of young people joining the union.

Potential for union renewal

Several trade union officials had only recently been introduced to the concept of union renewal. Both the FTA and the FTU described union renewal as 'a new way forward of designing strategies and how to maintain this unionism, as best as we can in our country', in order to 'make the union a formidable force, despite the challenges'.

Of course, both unions have for some years been developing new strategies and ways of working to transform their unions and to enhance their position in policy making. For example, the FTA recently undertook a strategic planning exercise that involved consultation with members about their vision of the union. However, one key challenge in the Fiji context to broadening unions' impact is their over-reliance on welfare, social and financial services to attract members. Such activities can be an important pillar of a union, particularly in a context of partnership with government, or even engaging in contentious action to pressure governments to make labour concessions. However, this approach leads to a particular type of engagement with members that can impact the type and scope of other initiatives and strategies.

For the most part, members appear to be connected with the union in primarily instrumental terms. Members mostly joined because of their unions' loan, health insurance, or sports initiatives. Mobilising these members for campaigns or action is incredibly difficult. Senior officials repeatedly suggested that this was due to constraints in the operating environment as a result of government control and surveillance. However, it is probably also their fairly limited engagement with members through a service delivery lens – reflected in the heavy focus on welfare and services in member recruitment, meetings, and activities – that inhibits 'renewal' in both the FTU and the FTA.

The question, and indeed a key opportunity for renewal, is how to maintain their membership numbers while also pushing the union into new forms of interaction with both members and the government. Reflecting on this challenge, one union official observed:

> *We really have to think about constructive strategies to push our way through in order to be heard. Maybe the unions need to design a lot of activities that will capture the interest of government officials to come onto our activity-oriented programmes.*

There was also a strong belief that new ways of working in partnership with government were required to reinstate unions to their former positions as key stakeholders in relation to education policy. As one commented:

> *The gap that has to be filled is in the partnership with the government. A partnership in empowering teachers, in leadership roles, empowering teachers on professional issues. Especially partnership in curriculum design. I think that is a much-needed gap that needs to be filled. There is a lot that the union and the government need to team up on to fill that space. The union is doing a lot. But we need to [fill] that gap.*

A further limitation of the union – and thus an opportunity for renewal – is the provision of professional development activities for teachers. This is a non-contentious area that the union can focus on to re-orient teachers and members to the role of the union beyond service delivery. Professional

development is also an excellent way to engage teachers in the union that moves away from the welfare model. This should include:

- Asking members what they want in a professional development programme
- Developing a mix of union-led formal and informal opportunities (peer circles at the school level complemented by more formal opportunities) in rural, as well as urban, areas
- Extension of core union functions that support teachers in their role as teachers, to improve the balance between these and the welfare services of the union

Financial sustainability is of critical concern for both unions, to the extent that it was suggested that the key to union renewal was to establish additional businesses so that the union could continue to operate even if the membership numbers dropped. A better way to manage this risk would be to identify ways in which the unions could become more relevant to teachers in their professional and personal lives. The values of both unions that position the union as essential to family and community are a critical foundation in the Fiji context.

A critical strategy for union renewal must include outreach to members. In one case, a teacher at a rural school had not received any contact from the branch representative in the first seven years of union membership. It was only when the teacher moved to another school that there was any contact with union officials, or indeed an opportunity to learn about the core functions of the union. Suggestions made by officials and members, from the branch level down, to connect with and engage members include:

- Identifying proactive strategies for finding out what teachers want and need from their unions
- Engaging more teachers in rural communities (who comprise the bulk of union membership in the FTA, at least). This was referred to by one member as building the network within the union, sharing stories and experiences
- Establishing a programme to recognise teachers' efforts, both professional and as unionists, in the various branches

Together, these initiatives would move the union away from welfare and services to develop a more balanced agenda. Stronger engagement with members and diversifying union strategy is likely to reinvigorate and activate the union's membership, particularly if the union can identify opportunities for members to become involved in the union other than sports meets and branch meetings. This process must focus on enhancing engagement with members in rural areas, looking for innovative ways to overcome the challenges of geography. Such an approach would also give FTA and FTU a solid and non-contentious platform to continue to re-engage with the national and provincial government.

Appendix B: India Case Study

In India, the political environment for civil society activists, unionists included, is increasingly constrained. Consistent with the government's pro-business agenda, worker's rights have been rolled back through a range of measures. Substantive changes to – and in some cases suspension of – labour laws at the state level have been implemented with little to no consultation with trade unions, affecting minimum wages, work hours, and other internationally recognised labour protections.

Considerable challenges exist for India's primary education sector. In 2018–19, the government announced its plans planned to raise 30 percent of the education budget from external sources, opening the door to large-scale privatisation. The government allocates approximately 3 percent of GDP for education, resulting in a considerable budget shortfall (EI 2017). Teachers are regularly assigned non-academic duties; there is an over-reliance on underpaid and non-regularised contract teachers; and many schools lack basic amenities such as adequate classrooms, teaching materials, and sex-segregated toilets. As a result, thousands of teacher vacancies remain unfilled and the student-teacher ratio is well above global averages. Absenteeism and dropouts are also high. Teachers' unions, meanwhile, are not accorded the status of trade unions, and teachers do not have the right to strike.

Education legislation and policy differs from state to state, and between the federal and state levels. This creates considerable variances in teachers' conditions, including pay scales and appointment, curriculum, and even the duration of primary schooling. While common issues are faced by all teachers across the country, these variations make national-level campaigns a more challenging task. It was evident from the interviews that while some matters – such as compulsory online courses for teachers during COVID – were a considerable point of contention in some states, in other states different matters were of central importance to teachers and unions.

Union profile

All-India Primary Teachers Federation (AIPTF) was founded in 1954 and inaugurated by the country's first prime minister, Jawaharlal Nehru. The broad aim of the union is the 'political, economic, cultural, mental and moral development of primary teachers'. Key objectives include promoting free quality education and taking measures to prevent the education system from privatisation and commercialisation. It has a neutral relationship with the government.

Union structure

The AIPTF structure has three main levels: national, state, and block. At the national level, the AIPTF structure consists of a president, two senior vice presidents, five vice presidents, one secretary general, two deputy secretary generals, six secretaries, and five organising secretaries.

The AIPTF has affiliates in 25 of India's 28 states. Affiliates' internal structures vary. In some states, a district consists of four or five blocks, while in others the structure is divided into a sub-division committee, block committee, and grassroots centre committee (10–15 schools in a locality). The block level is typically the lowest level in affiliates' formal structures. A considerable degree of member engagement happens at this level to ensure wider participation of, and engagement with, teachers. As one federation leader commented, the power in the union is concentrated at the block level: 'Block level leaders are very powerful. If the block is strong, the national (level) will be strong.'

State teachers' unions look to the AIPTF for advice on how to develop strategies, engage with the government, and secure concrete policy wins. The AIPTF also supervises and coordinates with state affiliates to enter into arrangements with the government (national or state) or other bodies. The COVID-19 pandemic has provided an opportunity for increased communication and discussion between state and federation leaders. Prior to COVID, meetings were held once a year. Now there are four to five online meetings a month. Union leaders said this was a positive development that would continue into the future.

Leadership and organisational culture

When considering the leadership and organisational culture of the AIPTF, it is necessary to distinguish between the federation and its constituent state unions. Our informants in the state unions have considerable respect for the national leadership; however, they recognise that it is set in its ways. Our interviews suggested that state leadership in at least some states is considerably more dynamic, having undergone a considerable process of renewal in recent years.

A key aspect of state-level renewal to date has been stronger engagement with younger members (defined as under 45 years), and their taking up executive positions at the state and block level. In one state, more than 80 percent of members are under 45, and retirees are not permitted to hold leadership positions. One union leader reported that this decision was made because young members felt that the union was not taking their issues seriously. In other states, some leaders are elderly retirees who retain their positions as a mark of respect. It is evident that states with a diversity of leaders (including age and gender) are particularly dynamic, innovative, and engaged with their membership. Their focus is to orient members to the ideology and values of

the union and what it can achieve for, and with, teachers, rather than simply bolstering membership as a numbers' game.

The AIPTF's constitution prescribes a 33 per cent reservation for women in leadership positions and requires affiliated unions to also include a similar provision in their by-laws. The specific positions reserved for women differ from state to state. Despite the quota system, union officials reported that in some cases reserved positions had not been filled by women, who were seen as being reluctant to take up posts due to family responsibilities, constraints on women's mobility after hours, the male-dominated culture within the union, and societal attitudes that call into question the character of activist women. Several female officials agreed that such barriers were in place, but also commented on the lack of space for female voices within male-dominated leadership, even when women held 33 percent or more of elected positions. In short, there remains an attitude within the union and in society that union work is not women's work. Moreover, in many cases, the positions reserved for women are not in key roles. Some officials commented that it was acceptable to the union for women – and especially young women – to be in leadership positions in the lower levels of the union structure, but not at the national level.

Membership profile and dues collection

The membership of the AIPTF's affiliates is drawn from primary and upper primary schools (school years 1 to 8). The AIPTF claims to represent around 2 million members through its state affiliates. According to the federation, this represents a density of 76 percent of the primary teacher workforce across the country; however, there is a considerable gap between declared membership and the dues paying membership. There is also considerable variation in membership density across states. Among the affiliates our informants represented, state unions represent between 50 and 85 percent of teachers. Across India, the gender distribution of the teacher workforce is broadly reflected in the AIPTF affiliates' membership.

The financial ballast is also at the state level. Affiliates remit fees of INR 1 per member per annum to the AIPTF. This is a negligible proportion of the total dues paid by members to those affiliates. Dues differ from state to state, with some states collecting INR 150 for three years, and others between INR 200 and INR 500 per annum. Dues are paid as a flat fee rather than as a proportion of salary. Thus, a junior and senior teacher will both pay the same amount. In some cases, dues are paid in three-yearly blocks. Dues collection is a difficult task for block-level officials. Dues are collected manually from individual members through the central committee and then deposited into the bank. Members who are dissatisfied with the block or district level union can refuse to pay their dues.

In addition to dues, members also contribute separately to the cost of running the union office, strike actions, and specific campaigns. Haryana, for example,

has 'a special fighting fund, for agitation' where contributions are not fixed, and instead dependent on the specific requirements of the campaign. These additional contributions range from INR 350 and INR 500.

Recruitment

Membership of AIPTF is widespread across schools throughout India. Members are recruited through peer counselling where existing members encourage new teachers in their school to join the union. Members explain the role of the union and its benefits to newcomers, who also attend meetings prior to joining. Complementary strategies deployed in some states include encouraging head teachers to join as a way of creating a more enabling environment for the union, and to attract more members. Contractual and non-salaried teachers cannot become union members, but they are encouraged to participate in union activities.

Union officials acknowledge that not all teachers want to join the union, usually due to their involvement or personal relationship with leaders and members of other 'rival' unions. They believe also that some teachers also choose not to join because they lack awareness of the AIPTF's role, activities, and achievements. In both cases, union officials at the block level visit non-members at their school and counsel them on the role of the union and its benefits. For this strategy to be successful, it is necessary that teacher-members have a relatively good understanding of the union, which seemed to be the case here.

Informants were attuned to the differences between membership numbers and member activity. In the view of one, 'When all the members are educated in union activities, then the union is strong. So, we try to make the members active, we want leaders at different levels, but we want active members.'

Engagement with members

AIPTF affiliates have established structured systems for member engagement. Block-level meetings are a critical tool for communication, as is the focus on school-level interactions with both teachers and school heads. Such meetings are important, but alone are insufficient to engage with AIPTF's 2 million members. COVID has provided a unique opportunity for higher levels of online interaction across the union.

Dues are critical to enabling the union to undertake activities – and it was through those activities that the union supported its members. The union also requires members who are knowledgeable about the union and engaged in its activities, as these people are an important resource in organising union initiatives and counselling potential union members. Members are thus seen as integral to the union for not only its financial sustainability but also its ability to engage in meaningful campaigns and activities that represent and support

its membership. As one informant commented, high numbers of members were important because dues provided a revenue stream for the union. 'Finance is the backbone of any union. If you don't have finance, you can't organise activities.'

At the state level, communication with many members is regular, occurring at block-level meetings and through social events. Monthly news bulletins are published along with leaflets for teachers highlighting particular problems, responses, and next steps. Informants estimated that around 80 percent of members were satisfied with the union. They said that many attended block-level meetings. In general, there appeared to be a good flow of information from the upper levels of the union to lower levels via the block-level president on WhatsApp. Personal networks and communications were also critical to sustaining the interest of members. As one leader commented: 'Block-level unions are aware of every teacher. Even every teacher knows who the office holders are. Blocks are small and all the teachers know each other. They can help in solving the issues on the school premises.'

Key achievements identified by the leadership

One key achievement identified by union leaders was the AIPTF's victory in relation to maternity benefits, which previously stood at one to three months. Following a union campaign, women who give birth were allocated six months' maternity leave (with some cash benefits) and ten to twelve days' paternity leave for their spouses.

Another key achievement in some states relates to para-professional teachers, who constitute a high percentage of the teaching workforce. As many respondents highlighted, these teachers are appointed locally by the school, are paid less than regular teachers, and are on fixed-term contracts. For example, the union's efforts in Haryana – which involved discussions with government, issuing of memoranda, protests, and media campaigning – led to the regularisation of approximately 3,000 of the state's 7,000 teachers from January 2021.

A further achievement identified was leadership renewal at the state level, where younger leaders have taken up critical posts. This has resulted in a positive effect on internal union strategy and recruitment. One key success for youth has been the regularisation of posts for new teachers. In Himachal Pradesh, the government appointed new teachers as contractual staff – initially on eight- and then five-year contracts. Contracted teachers are paid very low salaries and have no guarantee of ongoing appointment. When youths became union leaders, they focused on this issue, bringing the case to government, including at the court level with several teachers regularised through the intervention of Supreme Court. As one leader commented, 'This led to an increased trust of young people in our federation. As they saw our successes, more and more people started joining and coming with us.'

Key challenges identified by the leadership

Basic conditions for teachers and students are a key challenge in the Indian context. The Right to Education Act 2009 was a key driver of important government reforms to enhance the quality of education throughout the country. However, its implementation has led to a number of detrimental outcomes for primary teachers. Along with an increase in the number of schools, a teacher eligibility test was also implemented, which has resulted in a large number of unfilled teaching posts across the country and a skewed distribution of teachers in some states. One of our informants taught in a school where there is just one teacher for a hundred students.

Privatisation is a second, and related, core concern for the union. In July 2020, the national government released a new national education policy – its first in 34 years. In it, the private sector is positioned as a key stakeholder in education reform. State leaders also commented that the Department of Education is pushing for privatisation, which would be a significant barrier to access to education. While more affluent families may be able to afford the cost of private schooling, almost 20 percent of the population sits below poverty line. A further concern of some members is that the new education policy makes no reference to the teachers' union. This is a shift from the 1986 policy, which referenced the union and the rights of the teachers. More broadly, there was also a concern that the AIPTF rank-and-file membership is not aware of the policy and its implications.

Teacher benefits, including pay, are another core concern for the union. The seventh pay commission teachers' pay scale as set by the government is only implemented in states where state governments are under the control of the national government (e.g., Delhi, Andhra). These states receive the full scale. However, teachers in states such as Kerala and Tamil Nadu do not receive their full entitlements. As one state official commented, 'If we don't solve this problem, the organisation will become weak. The national union has to link to state issues. Some teachers are getting Rs 80,000 per month, some teachers are only getting Rs 8,000 per month.' COVID has exacerbated this situation with some governments paying teachers for one or two days per week, while teachers in other states have been without salary for four to five months. Moreover, many more precariously employed contract teachers have been removed from their roles.

The AIPTF has also mobilised a campaign to reintroduce the old pension scheme. Previously, teachers received a pension of at least fifty percent of drawn salary and medical allowance from 60 years, free of cost. However, the national government implemented a new pension scheme in 2017, which provides no certainty for teachers appointed after 2004. The new pension scheme benefits are dependent on investment returns. Despite concerted efforts at the national and block level, there has been no change in the government's position on the new scheme.

Union strategies

The AIPTF and its affiliates have engaged in, and won, important policy campaigns affecting working conditions of teachers, but also the quality of education. As such, their purpose clearly extends beyond traditional labour relations issues to broader social justice goals. There is a vibrant and emerging leadership at the lower levels, which has enabled the union to focus on issues that affect a wider proportion of the membership. Issues of member engagement, dues collection, and male dominance within upper leadership levels continue to underpin much of the union's strategy.

Engagement with national and state governments

Overall, interactions with government tend to be in the form of campaigning against, or resisting, government policies that detrimentally affect teachers. Both national and state leadership identified different state and national government policies and commented on efforts within the union to address them. They focused primarily on policies affecting the quality of education and teacher professional development; benefits for teachers including the pension scheme, pay scales and regularisation of para-professional teachers; and efforts to mitigate the commercialisation and privatisation of school education.

Some states were particularly active in mobilising against proposed changes to policy, drawing on and acting with their membership to take direct action. For example, in 2011, the government implemented the Central Teacher Eligibility Test after the passage of the Right to Education Act, which aims to enhance and benchmark education quality across the country. All teachers, including existing post holders, were required to pass a test to be employed as a government teacher. Those who failed lost their teaching posts. Teachers who had been in service for many years – and were therefore older and not as au fait with technology – were at a higher risk of failure. In one state, union members agreed to boycott the process. On the day of the test, they were joined by many non-unionised teachers in protest, forcing the government to shift its policy. This success had a direct, and positive, impact on membership numbers.

A more recent example of union influence relates to the online professional development for teachers introduced by education authorities during the COVID pandemic. In mid-2020, the government required teachers to complete 15 online courses to enhance their skills in online teaching. Teachers working from home, or on a 50 percent rotation, were instructed to complete the courses within three months. Completion of the courses required installation of multiple apps designed by non-government organisations (NGOs), causing some concerns among the membership of the additional work burden and the quality of course delivery platforms, which they felt largely benefited the NGO developers. Many teachers were unfamiliar with the apps and had received no preliminary training or information. As a result, the teachers who benefited most from the government's initiative were those with existing technical knowledge.

The union responded both nationally and in some states by opposing the requirement. The use of online networking and communication was a key tactic in some states. As one state leader commented, 'We used social media like a weapon … we made it go viral.' In that state, the union informed Education Department officials that teachers would not complete the trainings and instructed those who were completing them to stop. Union negotiations with the department resulted in an agreement that teachers could delete all but one app, and that those not confident with digital training could have the option of completing the trainings in person. In another COVID-related example, unions actively opposed onerous requirements on teachers to undertake duties outside their professional mandate. Teachers across the country were directed to run temporary COVID centres with little to no support, and no personal protective equipment. At the national level, the AIPTF negotiated with government to release teachers from many of these duties.

Engagement with the public

The AIPTF and its affiliates have a strong commitment to social justice through education. For example, one state official reported that their union had conducted surveys on how many students are not participating in school, especially girls. Information was collected at the district level, then the union identified a number of students who had the skills to speak publicly and organise rallies. These students were then encouraged to speak out about the importance of education for all. The AIPTF also brings its members together for special days, such as World Teachers Day and International Women's Day, which are key events for the Federation and its state affiliates.

Relationships between teachers and parents are also a focus for the union, especially at the block level. The importance of such relationships for the union, and its links to society, was emphasised by the AIPTF's General Secretary. The AIPTF has played an important role during COVID 19 for students and their families. Member teachers distributed ration cards and delivered public health messaging such as how to use a face mask and handwashing, thus highlighting the importance of union-community interface and how such activities can embed the union even further in public networks.

Professional development

Teachers' unions are ideally placed to engage their members in professional development. This aspect of their work was identified by respondents as a key area that needed improvement, as current offerings are limited. A key concern raised was the need to better coordinate with the government and with the private sector. Officials felt that the close relationship between the unions and teachers meant that unions are better than government officials when it comes to motivating teachers. For example, while government officials can place pressure on teachers to complete training in specified timeframes (such

as the mandated online courses for teachers announced in July 2020), the union is able to explain why it is helpful.

Professional development activities occur primarily at the block level. These activities are focused on quality improvement and are delivered through conferences and symposia to equip teachers with best practice examples of teaching methods. Since 1995, the AIPTF has worked in partnership with the Canadian Teachers Federation and Saskatchewan Teachers Federation to develop an extensive programme of professional development. The focus of this programme has been on providing teachers with new strategies and pedagogical approaches in the classroom. From 1995 to March 2008, 7695 teachers received training through this programme. While this number seems high, it is a small fraction of the AIPTF's 2.3 million members, leading some members to comment on the infrequency of professional development opportunities (approximately three to four seminars occurring at the block level in a year).

Individual grievance resolution and protection

Assistance in resolving grievances for individual members is primarily provided at the block level. Members can raise issues during monthly meetings, or increasingly, use social media platforms such as WhatsApp. If the problem cannot be resolved at the block level it is escalated to higher levels. As one member commented, 'If there are problems with service conditions, daily life and so on, office bearers at block level handle those problems. If the problem can't be sorted out, they convey it to the higher level.'

Mutual aid and welfare

Social activities are an important, but not defining, aspect of unionism at the block level in India. The AIPTF does not have the same kind of mutual aid offerings that teachers' unions in Fiji and Malaysia, both also former British colonies, have.

Potential for union renewal

The AIPTF is deploying strategies to retain and increase its membership, as well as gain traction with national and state-level governments on policy issues that affect teachers and their students. However, senior leadership had only recently been introduced to the concept of union renewal. As one official explained:

> *I only heard about this recently – that we should have new strategies on how to bring in more members, and union leaders need to be more aware of the different levels, local, state, national, etc. It means strengthening the union, thinking about the past, and where to go.*

To renew, or transform, officials believed that the union needed to link with society and the community (including parents), but also to engage politically. EI was identified as a critical part of the AIPTF's renewal strategy. According to the AIPTF's General Secretary:

> *How to fight, how to bargain, how to meet with political people, these are the issues we are guided on by EI. Otherwise, it is too difficult for us. We circulate documents from EI at the grassroots level, translating them into regional languages. This is also part of the renewal.*

While the term may be foreign, the AIPTF has already embraced the concept, and has taken steps to change its strategies in response to the union renewal agenda. For example, it has amended its constitution to include more youth and women in leadership positions. Affiliates are required to mirror these provisions in their bylaws, in order to maintain their eligibility for membership of the Federation. These strategies have led to tangible outcomes, such as a 35 percent increase in women's membership. An estimated 40 percent of women teachers participated in the agitations and protests organised by the AIPTF and its affiliates on the 7th Pay Commission across all states for restoration of the old pension scheme.

Creating space and diversity within the leadership and the membership has led to some impressive wins in state unions. It is critical for the unions to seek out and listen to these voices. At the same time, some leaders at state level and lower felt that their potential for decision-making and change within the union was limited because attitudinal change among some leaders (older men) had not accompanied these policy changes. The union is conducting a number of awareness programmes and webinars to engage women and develop an understanding of the role of the union. However, this presents an opportunity for further renewal.

While a narrative around a joint state/national agenda in the union was evident, some informants felt that addressing local challenges was not a matter for, or responsibility of, the federation. Rather, they said, new strategies were required at the grassroots level.

Appendix C: Philippines Case Study

The national context

The Philippines is a difficult context in which to operate as a union. Unions in many different sectors, including education, have been targeted in overt crackdowns, as well as through systemic forms of discrimination. As the ITUC's General Secretary, Sharan Burrow, has observed, 'What we are seeing in the Philippines is a blatant appropriation, by the ruling party, of government forces to undermine labour organising and, more generally, to attack voices of dissent in order to consolidate its political power' (ITUC 2019). The Alliance of Concerned Teachers (ACT) has been a target of anti-union forces. Its General Secretary, Raymond Basilio, has received multiple death threats, an ACT provincial coordinator was arrested, and two ACT teachers were shot at in their classrooms by masked men (Basilio 2019; EI 2019b). Activists from the union have also been profiled under the government's anti-terrorist legislation. The economic situation is also challenging, with the government making drastic cuts to funding for public schools (EI 2017). The task of teachers' unions is exacerbated by the decentralised nature of the Philippines education system, where bargaining for recognition takes place in each of the country's 17 administrative regions. As a consequence, teachers' unions must fight for recognition in each administrative region before they can be recognised as a negotiating partner.

Union profile

ACT was established in 1982 during the martial law period. Having initially had a focus on private sector colleges and universities, it is now the largest public sector education union in the country.

Union structure

ACT is an umbrella organisation whose members consist of education unions and union federations, as well as other organisations with an interest in education. ACT has a registered branch in all 17 regions in the Philippines. In the five regions where ACT is a recognised negotiating partner, it has volunteer coordinators that help full-time teachers to run the union. In the majority of the regions, however, that work is done by the national office.

Each of ACT's branches has lower-level structures at the city and division levels. ACT also has school chapters, which conduct elections for their own

official positions. One problem identified by officials was the irregularity in these local electoral cycles, with some schools holding elections every year, some schools every two years, and some schools every three years. Branch officials reported that shorter cycles were very disruptive, and that they were campaigning for a uniform three-year term.

ACT also has a political wing, called the ACT Teachers Partylist, which represents teachers and other education sector workers in Congress, where members campaign on education-related issues and support union court cases.

Leadership and organisational culture

ACT is a dynamic, outward-focused organisation. The Philippines teaching profession is relatively mature, and at times it is hard for young teachers to influence older members. ACT tries to create positions for young leaders, although there is considerable resistance at the school level. Many of these young leaders are products of its campus chapters. According to one young leader, 'The union requires leaders that can adapt to change and respond to teachers' needs. Teachers are changing, the platforms are changing, the situation is changing. We need to work out how the union can thrive in this situation; how can it be sustained in these fast-changing times. We need to act very fast.'

The branch leaders we spoke to said that the national leadership is supportive and democratic. In the words of one:

> *The national level just analyses the data coming from the ground and gives us direction about what we will say officially at the branch level. They also help us technically to make sound judgements. We may have some weaknesses or make our decisions emotionally. The national level guides us on how to be more objective.*

Some branch leaders meet up to twice a month to discuss their campaigns and to share insights from different localities. Access is, of course, much easier for branches located in or close to Metro Manila than for those located further afield.

Membership profile and dues collection

Although membership is open to the private sector, most of ACT's members are employed in public schools. As of 2014, ACT had 113,382 members, a number that had risen to 170,080 in 2017, and to over 200,000 in 2020. Most teachers at the schools of the members we talked to were also in the union. However, very few of those members pay dues since dues are only collected in some of the regions where ACT has a Collective Negotiation Agreement (CNA) in place. The National Capital Region (NCR) is currently one of the three regions in which dues are currently collected. There, around 57 percent of teachers are ACT members, all of whom pay dues of approximately USD 0.41 per month.

Informants report that government requirements are a major hurdle to more effective dues collection. Each member is required to submit an authority to deduct to the Department of Education. Government policy requires that dues can only be collected from public school teachers through an automatic payroll system, and some regional administrations have made it difficult to put a system of checks in place. It would be possible in private sector and in higher education institutions, but officials report that the workload associated with doing so would be too high.

Recruitment

According to union officials, they remain very grounded, which helps in their efforts to reach out to new members:

> *The strength of our union is that we are all practising teachers. From our experience in our school, how the school head treats us, how teachers feel about local to national policies. Teachers can relate to our experience; we can ask them if they have the same thoughts about various policies. It's a strength that the union leaders from the school.*

A key element of ACT's recruitment activities is its very active youth branches on campuses that have a teacher training programme. Almost all of the regional officials we spoke to had been active since their campus days. As one reported, 'That's one of the best practices we have in our union, that when you are still in college, studying education, you have an opportunity to get organised and to learn about the issues in the education sector. It was due to that when I graduated, I joined the union.'

The second key time for recruitment is during the orientation phase for new teachers, where ACT officials explain the benefits of becoming a union member. One official reported that the right to participate in the opening ceremony of the school each year was negotiated as part of their CNA. School chapters then follow up with their own orientation activities. Presidents of school chapters are provided with training on how to conduct these orientation activities independently.

A third key element of the recruitment strategy is to build recruitment activities into forum discussions and consultations conducted around the country by the national leadership. Non-members are invited to these activities. As one official observed, 'We always bring the membership forms with us. If you let them go home without signing, it's a lost opportunity.' Although they also use social media, officials report that the union has yet to identify a suitable substitute for these face-to-face activities under the current circumstances.

The fourth element, in place in some branches, is to actively monitor membership. One official reported that their branch tasked its district representatives with getting each school to update its membership records. 'We have a checklist per school … Each officer will go to the schools and check

if all the teachers are members, all have their IDs, are paying their dues.' It was not clear, however, how widespread this level of engagement was across the country.

Engagement with members

ACT officials report that they take a holistic approach to engagement with members, embedding discussion of the union's broader strategies within other elements of their work, such as the provision of welfare services. They recognise that different members have different levels of appetite for engaging in union activities. As one reported:

> *We have a different approach for active members and not so active members. We have what we call 'solid organising'. This is our active members that always attend our activities, in mobilisation, our education program. We have a databanking system, where we list our members who are active in different activities. We can see from that how active they are.*

When asked how they work to make inactive members more active, another reported:

> *The key way to get them involved is to deal with them. We always talk with them to make them realise that the union is always there. It's always beside them, and we are one of them … Teachers must always see the essence of collection action, especially in the current situation. It is a challenge that the union is being attacked but we need to continue the fight.*

Officials report that there is a regular programme of activities within their branches and at the school level, while acknowledging that not all branches succeeded in maintaining the same level of activity. Where school chapters are active, they hold a monthly meeting of teachers where the school president or the branch president talks about the local situation but also about activities at the national level. In regions with a CNA, unionists have the right to address teachers on school premises in this way. Monthly meetings are also held among the city branch leaders, who can then relay relevant information to lower levels of the union.

One branch official from one of ACT's most active branches reported:

> *In our branch, we have 156 school chapters (elementary, secondary, senior high school). In terms of attending the monthly meetings, we have 90-100 members who attend regularly. In terms of mobilisation, before COVID, about 50 of the 150 schools could get teachers to attend an outside activity. In terms of education, almost 90 percent of chapters have attended some education programmes.*

During school meetings, officials talk about the union's campaigns and ask about the situation at that school. In one branch, an official reported that they visited the inactive schools each month to talk to the school head and to the teachers. Professional development programmes offered a way into inactive schools, as union officials can ask to give a short presentation as part of professional development seminars.

There is also a recognition programme for the most active school chapters, and most active school chapter presidents, which 'recognises their hard work'. These awards consider attendance at meetings, participation in campaigns, and whether they run education programmes at the school level.

Social media is an increasingly important channel of communication, which ACT makes available not only to union members but to all teachers. This has greatly increased the two-way traffic in terms of communication. As one official noted:

> *In the time of social media, all teachers have access to information. Before, they only just read our memos, but now they can directly engage, comment on posts, or bombard our inboxes with different concerns. We are reading that and validating that through our union leaders. But I can say it's very democratic. In fact, members can be very demanding on social media – they ask what our stance is, about what we are doing.*

As elsewhere, social media has not only provided a useful tool for the dissemination of information but also a means by which members can provide input to union officials.

Key achievements identified by union officials

A key achievement identified by national and branch leadership was securing status as a recognised negotiating (bargaining) partner in five of the country's 17 regions. In the National Capital Region, which was the first region to achieve this status, ACT has been part of two successive Collective Negotiation Agreements (CNAs), which have included monetary and non-monetary benefits for members. In the National Capital Region, these have included an instructional material allowance and a clothing allowance, as well the right to refuse to come to work if it is not safe to do so (a provision that has been important in the context of COVID-19). It has also guaranteed representation on various committees within the local Department of Education and ACT's involvement in planning for Teachers' Day celebrations. Perhaps the most important benefit secured through the negotiating process has been the right to strike, which has been recognised since 2016 in all five regions where ACT has negotiating partner status. In the Philippines, teachers are the only group of public sector workers to have this right.

Some allowances can be secured even without negotiating partner status. ACT officials reported that branches in 10 of the 17 regions have negotiated some

local allowances. However, it can be challenging to secure implementation of agreed provisions even where there is a CNA in place. One union member told us that the regional director in one region where ACT has a CNA delayed signing the agreement until he was forced to do so when they demonstrated outside his office. Importantly also, salaries are not within the scope of a CNA, but are rather set by law.

Key challenges identified by union officials

The leadership identified two key challenges for ACT. The first of these was its relationship with the Duterte government, which has 'red-tagged' the union, claiming that it is a front for Communism, and sometimes even that its members are terrorists. Leaders in the regions are being harassed and threatened, including three regional presidents who have experienced what the General Secretary describes as 'severe cases of human rights violations'. Until last year, when martial law was lifted in Mindanao – which accounts for six of the country's 17 regions – the union could not operate at all.

The second key challenge is securing negotiating partner status in the 12 regions that do not already have it, including the six in Mindanao. A union must have the support of a majority of teachers in a region to secure this status. This task has been made harder by a new rival union, the DepEd Teachers Union (DTU), which was established after some 3,000 teachers from the National Capital Region disassociated themselves from ACT, saying that ACT had done a poor job in improving teachers' welfare. ACT claims DTU is an employer-sponsored union.

Officials provided other examples where government intervention and the struggle over negotiating partner status came together. In Central Luzon, ACT recently lost to Action and Solidarity for Empowerment of Teachers–Central Luzon Union (ASSERT) in a ballot to determine negotiating partner status. According to a branch official from Central Luzon, army personnel visited them and other branch leaders in the lead-up to the ballot, monitored particular schools, and took pictures of them and of other ACT members. ACT challenged the verdict but was unsuccessful. They are currently filing another challenge.

Union strategies

ACT focuses strongly on social justice as an activity domain, and proudly acknowledges its strengths as a campaigning organisation concerned with both education issues (especially privatisation) and broader social justice issues. As the General Secretary explained, 'Because the Philippines is a struggling third world country, we make a point of engaging in the issues of the nation. We don't want to isolate ourselves to matters in the schools.' Reflecting its political orientation, ACT also seeks to mobilise its grassroots, primarily through its campaigning activities.

In addition to campaigning, ACT officials reported that they are active in both the policy and case management aspects of labour relations, and in pursuing professional development aspects of teaching as a profession. In contrast to some of the other unions we engaged with, it had little focus on mutual aid.

Engagement with national and regional governments

An important difference between ACT and other teachers' unions we spoke to across the Asia-Pacific is its parliamentary wing, which allows it to voice teachers' concerns within Congress. However, ACT's primary mode of engagement with the national government is confrontation. For example, ACT lodged several court cases after the national police allegedly undertook nation-wide profiling of ACT members in 2019. The case in the Supreme Court was dismissed on technical grounds, but ACT currently has cases before the Human Rights Committee and Ombudsman.

As well as campaigning on human rights issues, ACT has also engaged with government about the increasing involvement of private actors in education provision, for example, the agreements between Ayala-Pearson and the Department of Education. Representatives of ACT and SMP-NATOW contributed as resource persons to the hearings on APEC schools, which had been co-designed by Ayala-Pearson and the Department of Education, and which had been given exemptions from some of the requirements imposed on other private schools. Following the hearings in 2018, the Department of Education promised that it would not renew agreements with Ayala-Pearson in 2019, and that APEC schools will have to comply with the Manual of Regulations for Private Schools in the Philippines.

Another, more recent example, has been ACT's campaign ensuring the safety and quality of education during the COVID pandemic, which has had both national and regional elements. At the national level, ACT has campaigned for budgetary allowances for COVID measures and regional branches have negotiated with regional governments to secure handwashing facilities, for example. Officials from one branch reported that they had recently engaged in dialogue with the Education Department's Division Superintendent to discuss the 'new normal' in education. Issues covered were concerns about online learning, including a request for an internet allowance for teachers, which the Superintendent agreed was necessary and undertook to deliver.

Engagement with the public

Although ACT engages directly with government where possible, public campaigning is its key strategy. As one official noted, when faced with pressing issues, ACT regularly resorts to 'the parliament of the streets'. COVID-related issues that have been a focus for public campaigns include the provision of comprehensive health programmes for teachers, expense allowances

while working from home, and better support for distance learning. Broader education-related issues include ensuring that all school-age children are in school (some three million children in the Philippines are not receiving an education), calling for an increase in the basic salaries of public-school teachers, a reduction in workloads, and the enactment of an earlier retirement age. ACT's campaign strategy requires extensive involvement of their membership. As one official reported:

> *We don't keep these activities restricted to the leaders. We open our activities to our members, so that they can see their value in these activities. At first, they are afraid, but then when they realise that it's not dangerous, you can see them very noisy, happy. It's their way of showing their disappointment, their anger. It's their opportunity to criticise the government for doing nothing to improve their working conditions.*

It is noteworthy also that – more than any other union we engaged with – ACT focuses on bigger-picture social justice issues such as human rights, including gender rights and the rights of indigenous peoples, as well as land reform and the environment. ACT has also engaged with the public around COVID. For example, in March 2020, when the first lockdown began, ACT coordinated a donation drive for health frontliners called 'ACT for people's health'. The campaign was conducted from the national level down to school level, where it received support from school heads. ACT mobilised teachers, students, and parents to donate, collecting a million pesos.

Professional development

Professional development has been a substantive focus for ACT. Topics covered included curriculum changes, how to handle classes, how to be a more confident speaker, and leadership training. During the pandemic, these programmes have transitioned to an online environment.

As elsewhere, professional development activities were seen to be a mechanism through which to interest new members. Informants felt, however, that it was important both to balance professional development and union-oriented activities, and to integrate the two. As one noted:

> *In workshops about how they can be a good teacher we never forget the discussion about the issues, the discussion about the union, the discussion about how we can mobilise and organise. For example, when we have a leadership training seminar, the first thing we do is have a discussion of the national and education issues. So, the teachers have their framework on how to develop themselves as a professional and as a union leader at the same time.*

The focus and frequency of professional development programmes is determined at the branch level. The most active branches reported holding

professional development programmes three to four times a year at the branch level, and less frequently at city and division levels, while school chapters also conduct their own professional development.

Individual grievance resolution and protection

Another function of the union is to assist with individual grievance resolution. Where there is an active CNA, union officials generally have a seat on school-level grievance committees. These committees are headed by the faculty president, most of whom are members of the teacher union. ACT also has a hotline to provide teachers with a way of communicating their grievances and also provides legal services for workplace-related issues.

An example of ACT's handling of individual grievances provided by informants related to a case of a corrupt school principal who also behaved in an extremely discriminatory way against one teacher in the context of a promotion process. The case could not be resolved at the school level, so it was shifted first to the division level and then to the branch level. The principal was removed.

Mutual aid and welfare

Unlike many other unions we engaged with, ACT officials had relatively little to say with regard to welfare and social activities, although one noted that teachers were supported in regard to money matters. According to one official, the union could do more in terms of welfare, particularly in the area of mental health:

> *We could have collaboration with other professions to improve our welfare services, for example, in providing psychological help. That is an untapped resource that would provide holistic help for teachers, not just economic help, but to boost their morale. In the current situation, psychological help would definitely be helpful.*

While alliances certainly offer potential in this and other areas, a stronger dues base would make it possible for the union to expand its activities in this and other service domains.

Potential for union renewal

ACT comes across as a dynamic, public-facing union with a strong vision for integrating labour relations, professional development, and social justice into its identity. It also has a growth mindset and relatively well-developed channels of communication with members in the regions where the union is more established. The General Secretary could point to concrete changes

that had been made to improve recruitment during his time in office, including introducing repeat school visits in the National Capital Region, where activists begin by identifying a small number of sympathetic teachers, then work to expand the union's visibility, including by talking to school heads about the benefits of being part of the union. The union also has an established protocol for eliciting member feedback on its activities, which it feeds into future planning. On the basis of grassroots feedback, it has also introduced a system of awards to recognise the achievements of its most active branches.

At the same time, officials at the national and branch level acknowledge that the union faces a great many challenges as a consequence of the political situation and the challenges of securing (and maintaining) negotiating status. Officials from the union's most successful branches are invited to share their best practices with officials from other regions, who then consider whether those practices are transferrable. There remains, however, much to be done in terms of embedding the union nationally. Some key starting points in this regard could include more systematic dues collection to provide a more sustainable financial base for union activities, as well as finding ways to expand member mobilisation strategies but also strategies for engaging productively with local government in the regions where the union is less developed.

Education International
Internationale de l'Education
Internacional de la Educación
Bildungsinternationale

Education International Research

Union Renewal in the Education Sector

Prospects for the Asia-Pacific

Michele Ford
and Kristy Ward

March 2021

Education International
Asia-Pacific Region
EIAP

Education International
Asia Pacific Regional Office

53-B, Jalan Telawi 3
Bangsar Baru 59100
Kuala Lumpur, MALAYSIA

Phone: +6 03 2284 2140
+6 03 2284 2142

Fax: +6 03 2284 7395

Email: *eiap@ei-ie.org*

Website: *www.ei-ie-ap.org*

Education International represents organisations of teachers and other education employees across the globe. It is the world's largest federation of unions and associations, representing thirty million education employees in about four hundred organisations in one hundred and seventy countries and territories, across the globe. Education International unites teachers and education employees.

Published by Education International - March 2021
ISBN 978-92-95120-19-8 (PDF)

Cover picture: ACT Demonstration in Philippines, Education International / ACT