Education International

Teacher Union Governmental relations in the context of educational reform

Report by

Nina Bascia & Pamela Osmond
Ontario Institute for Studies in Education
University of Toronto

September 2013

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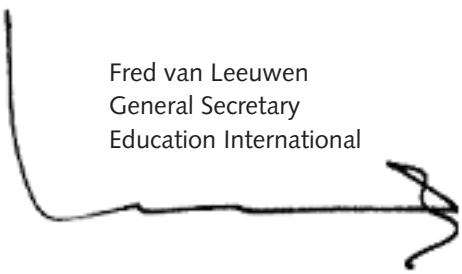
FOREWORD

All the evidence shows that successful education systems rely on strong self-confident teaching unions working in partnerships with governments on education policies. It is extraordinary that this fact seems surprising to many - particularly those who believe that it is quite possible to terrify teachers into accepting the latest imposed reform. Yet it should be self-evident that organisations representing teachers are in an extremely powerful position to sustain and improve high quality education. Teachers are after all the people on whom children and young people rely for their learning. This is why the Nina Bascia's study "Teacher union – governmental relations in the context of education reform" is so powerful. It emphasises that governments ignore teacher unions at their peril when constructing education policies. It also makes clear that genuine partnerships between teacher unions and governments are based on understanding pluralism; understanding that governments and unions have different roles and that union/government relationship should be informed by respect both for agreements and disagreements. I commend this study because it shows just how important teacher unions are to education and to the future of children and young people.



Fred van Leeuwen
General Secretary
Education International

CONTENTS

EXECUTIVE SUMMARY

This report is concerned with collaborative, productive relationships between teacher unions and governments. While not the norm, there are a number of such relationships in existence around the world. Drawing from interviews, survey responses and available literature, this report provides descriptions of several of these collaborative relationships. It considers international trends in relationships between teacher unions and governments; political, cultural and structural influences; the discursive nature of teacher union-government relations; and the outcomes of these relations on policy and practice.

Teacher union-government relationships occur in a reform context focused on improving educational outcomes at a time of increased competition among nation-states as well as economic austerity. Teachers are the objects of most of these reforms, and teacher unions are pressed to advocate on their behalf. In many countries, unions focus their energies on influencing policy development; when they are able to strike up a working relationship with government, teacher unions must balance maintaining these relationships with advocacy work on the part of their members. Teacher unions attempt to achieve this this balance: by identifying issues that are simultaneously of interest to teachers and government; by augmenting or extending reform initiated by government; or by engaging in parallel play with government, developing and implementing reforms of their own.

The report provides four case studies of teacher union-governmental relations – in Sweden, England, South Africa, and Alberta, Canada. Sweden has experienced a long history of cooperative relations between unions and government, rooted in a general cultural preference for collaborative decision making. In England, under the New Labour government, a "social partnership" established a working group of unions, the government and employers with far-reaching decision-making authority. The South African teacher unions work with the government to some extent, but also engage in their own infrastructure-building projects. The Alberta Teachers' Association has been proactive in terms of education reform through different types of relationships with governments.

The reform discourses employed by teacher unions and governments indicate where they converge and where they take different positions. Unions and governments that work together tend to share common discourses. In the four case studies, collaborative reforms fall under the rubric of "raising teacher professionalism," generally speaking. The cases also demonstrate divergent positions on reform between union and government, in one case when government change in discourse led to a change in

dynamics and in a second case where a teacher union successfully replaced the dominant government discourse with one of its own.

Teacher unions and governments should recognize the value of establishing and maintaining collaborative relationships. Strong teacher unions provide an important counterweight to the influence of neo-liberal reform, and union-government relations have the potential to improve the quality of educational practice. Legislated requirements for union-government interactions help ensure the endurance of productive relations.

Teacher unions must balance their interest in maintaining positive relationships with government with respect for teachers' issues and concerns. Teacher unions also have the capacity to support teacher involvement in decision making, articulating and promoting a positive professional identity, and quality conditions for teaching and learning independently of government.

Educational International can foster the expansion of teacher union-government cooperative relationships but must do so while promoting reform ideas that strengthen teacher capacity, paying attention to issues of pluralism and articulating the important role of teacher unions in ensuring quality conditions for teaching and learning.

Teacher union-government collaborative relations are of significant value to attempts to advance educational quality. Teacher unions are a source of innovation and ideas, and their efforts to advance teacher capacity are directly relevant to the conditions of teaching and learning. Teacher unions themselves, policy makers and Education International all must play their parts in establishing, maintaining and promoting union-government relationships.

1. INTRODUCTION

Any genuine desire to improve teaching and learning must necessarily be concerned with the environment in which teaching occurs (Bangs & Frost, 2012; Bascia, 2008a). One of the primary functions of teacher unions is to act as the vehicles by which teachers' concerns about the conditions of teaching and learning reach the attention of policy makers (Bascia & Rottmann, 2011). In a context where teachers by definition have little formal authority to participate in policy discussions, and where educational decision makers have limited knowledge about the dynamics of educational practice, teacher unions' role is critical.

In addition to playing this bridging role, teacher unions are sites where new policy ideas are developed. They can be settings for educational experimentation and innovation, research, teacher leadership, and teacher learning, thus increasing the capacity of educational systems more broadly (Bascia, 2000, 2005, 2008b). Yet in many countries, when government officials develop educational legislation, teacher unions are absent from the table. Often established after, and even in reaction to, formal educational systems, teachers' organizations are not always viewed as legitimate decision makers, and they often are perceived as working in opposition to official educational priorities.

In some parts of the world, however, teacher unions are understood as critically important to educational quality and have broadly positive working relationships with government and local educational employers. Ben Levin (2010) has noted that virtually all top performing countries on international educational measures have strong unions – that is, unions that play an active role in educational decision making and participate in setting the educational reform agenda. In these jurisdictions, union influence is more or less taken for granted and unions are recognized for providing unique resources. Through the reports of their teacher members, unions provide important system feedback on the actual conditions of teaching and learning "on the ground." In some contexts, teacher unions provide necessary infrastructure for educational systems where such capacity does not otherwise exist. And some unions are capable of fostering innovation, bringing needed new educational practices into being.

There is growing international interest in the nature and impact that close teacher union-government relations may play in ensuring educational quality (MacBeath, 2012). A major indicator of this interest is the annual International Summit on the Teaching Profession, an event jointly planned by Education International, the Organisation for Economic Co-operation and Development (OECD) and the host national Ministry of Education. The Summit, which has run annually since 2011, brings together teacher union

leaders and ministers of education from over 25 countries around the world. The content foci of the Summits are aspects of teacher policy. But perhaps even more significant has been the process of creating opportunities for government officials and teacher union leaders to find common ground on which to work collaboratively over the coming year. The OECD itself has considered sponsoring research on the role of teacher unions in educational reform (OECD, 2011).

This report is intended to contribute to the discourse on social dialogue and partnership by exploring the phenomenon of teacher union-government relations, to consider international trends in relationships between teacher unions and governments; how cultural, political and structural factors shape the working relationships between teacher unions and governments; the discursive nature of teacher union – government relations; and the outcomes of these relations on policy and practice.

This report is the first study of its kind. While there exist a number of accounts of teacher union-government relations in single or a small number of jurisdictions, this is the first comparative international study of a magnitude sufficient to begin identifying patterns and representative issues in union-government relationships.

This study presents four case studies of relationships between teacher unions and government where there are or have been positive working arrangements: Sweden, England, South Africa, and Alberta, Canada. The cases have been constructed through interviews with involved participants as well as drawing from the available literature about these jurisdictions. The report also draws from survey responses from Education International's teacher union member organizations regarding relations with governments and issues of substantive concern. The sixteen member organizations that responded to the survey, representing twelve different countries, enable us to situate the case studies in a larger context. The countries represented in the survey responses are Australia, Belgium Flanders, Canada, Denmark, England, Finland, Ireland, Japan, Norway, Spain, Sweden, and the United States of America.

This report is organized as follows: Part 2 describes the political, economic and reform contexts within which teacher union-governmental relationships operate, and the fundamental tensions that characterize these relations. Parts 3-6 describe how relations between teacher unions and governments have been affected by these current reform and fiscal contexts in different educational jurisdictions. Each of these sections begins with a general description of the context and the phenomenon, drawing on international evidence, then focuses on one case for illustration. Teacher union priorities and strategies with respect to their relationships with government are delineated in Part 7. Part 8 focuses on the role that discourse plays in establishing, maintaining or redefining relations between teacher unions and governments. Part 9 discusses

teacher unions' influence on educational reform in the context of union-government relations. The final part provides conclusions and recommendations arising out of the report.

Because research time and resources were finite, the report cannot claim to cover in any detail the wide range of possible arrangements of teacher union-government relations. The case studies depicted in the report must be treated as examples of a complex phenomenon, and as snapshots of a phenomenon that is uniquely volatile and subject to change, particularly in the current international context. The intention is to provide readers with a basic understanding of the factors associated with arrangements between teacher unions and governments.

2. CONTEXT AND CONFLICT

The current international context in which teacher unions engage with governments is characterized by the widespread adoption of substantial policies focused on improving educational quality and outcomes, in efforts to secure a competitive advantage in an increasingly globalized and integrated economic world order (Stevenson, 2007; also Levin, 1998; Steiner-Khamsi, 2004). Countries and jurisdictions are pressed to respond to "global discourses," disseminated by global organizations such as the World Bank and OECD and to "borrow" policy ideas from one educational jurisdiction and enacted in another (see Apple, 2008; Ball, 1999; Hayhoe & Mundy, 2008; Whitty & Power, 2003).

One influential driver of educational policy activity is concern about global ranking results derived from international assessments, such as the Program for International Student Assessment (PISA), the international study by OECD of 15-year-old school students' performance in mathematics, science, and reading literacy. The reforms undertaken in response to PISA results reconfigure teachers' initial and on-going professional learning, national and local curricula and intensify comprehensive approaches to evaluation at every level. These drivers are as powerful in developed countries as they are in developing countries.

In a period of worldwide economic downturn, governments have been working to reduce costs in public expenditure (Bell & Stevenson, 2006) and the educational sector has not been spared. As a result, austerity measures reduce the availability of resources for policy implementation. Many countries, both developing and developed have seen increases in governmental support for educational privatization (Ball & Youdell, 2008), including the diversion of funds from public to private schools. A number of countries, too, are experiencing a chronic under-resourcing of education, particularly for children living in areas of social and economic deprivation.

Educational reforms vary across educational jurisdictions. Some emphasize centralized evaluation and control while at the same time devolving managerial control to institutions. Others focus on developing teacher policy. In the former the convergence of these tendencies and tighter educational budgets has resulted in a "triage" approach to educational reform: fewer resources, less diversity and experimentation, an emphasis on traditional roles and activities for teachers and school administrators, reporting systems that emphasize surveillance rather than bi-directional or lateral informing, and an infrastructure that is lean on support for teaching as daily practice (Bascia, 2005).

Teachers are at the centre of most current educational reform efforts, either because the reforms themselves focus on teachers, or because the reform proposals directly impact on teachers' work. For example, new curriculum and student assessment schemes place greater controls on what and how teaching is carried out, and require more time and energy spent on administrative tasks by teachers (Carter, Stevenson & Passy, 2010). New teacher inspection practices affect them in terms of "workload, bureaucratization, stress, demotivation, alienation and feelings of insecurity" (Verger, Kosar Altinyelken & De Koning, 2013, p 149; also Robertson, 2012).The "crisis" in teaching and teachers' work has led to large proportions of the teacher population exiting the profession after a few years.

Table 1. Issues of concern to teacher unions

Education International member organization survey, 2012

ISSUE	FREQUENCY: OUT OF 16 RESPONSES
Basic educational services	13
Funding for public education	16
Quality teaching conditions	16
Educational reforms	15
Relations with government	13

Teacher unions by their very nature must be responsive to their members' concerns about local working conditions (Compton & Weiner, 2008). As governments attempt to secure a competitive advantage internationally by demonstrating improvements in educational outcomes and quality, they may be less likely to heed the concerns and advice of teacher unions internal to their jurisdictions. Large-scale reforms may be rolled out without sufficient concern as to how new policies and practices will interact with, and impact on, local context factors. This is exacerbated under conditions of austerity, when there is less money to be spent ensuring effective implementation. In jurisdictions where teacher unions have a broader role in influencing educational policy, they may be able to temper the effects of reform that emerge during implementation.

Antipathy between teacher unions and government is likely in the current context. There are fundamental tensions between teacher unions and governments that may become more explicit at this time. Governments that have constitutional authority over educational matters fundamentally control unions' participation in educational decision-making. In some countries, union involvement in policy development is legislatively guaranteed. In many countries, however, any involvement in influencing policy directions occurs at the discretion of the government and can be redefined at any time.

Teacher unions may play an advisory role with respect to substantive policy issues, but in many jurisdictions, their purview is restricted to the only concerns in which they could claim some legitimate involvement such as matters of teachers' salary, benefits and working conditions. Their ability to negotiate even in these areas can be restricted to a shrinking range of issues both because of reduced funding and by legislation (Bascia, 1994, 1998a, 2008). Over the past several decades, as vocal criticism of teachers has increased, so has criticism of teacher unions. In many places, government and the news media and public portray teacher unions as illegitimate, unprofessional, simplistic and selfish in their priorities (Bascia & Osmond, 2012). In many countries, teacher unions have been shut out of educational decision making processes.

Where teacher unions are strong partners in educational decision making, they must walk a fine line between a focus on relationship maintenance, support for jointly agreed policies and advocacy work on the part of their members (Bascia, 1994; Bascia, et al., 1997). Teachers' expectations of their unions are both an individual and a collective phenomenon. What teachers want depends on who they are, where they are and the kinds of students and programs with which they work. Most descriptions of teacher unionism view teachers as a homogeneous mass. Closer glimpses of what teachers' value reveal tremendous variation in what teachers want from their unions and why, and yet there are patterns to this variation. The structural and political conditions of teaching engender certain kinds of needs and wants: the ways social class, race and gender play out in schools, teachers' subordinate status relative to administrators and policy makers, and the problematic of teachers' professional identity encourage teachers to turn to unions for resolution and yet, paradoxically, teachers often have ambivalent relationships with their organizations. When teacher unions recognize these patterns and take them into account, they can greatly increase the power of unionism for teachers and the power of unions in their advocacy for teachers' aspirations within the larger educational infrastructure. However, this process is particularly challenging for teacher unions because of the wide variation in teachers' professional issues, even in the same jurisdictional context (Bascia, 2008a). It is an unusual union that is able to simultaneously attend to the plurality of teachers' concerns, articulate a consistent yet comprehensive message which projects a proactive stance toward educational reform, and engage productively with government (Bascia, 2009).

3. COLLABORATIVE WORKING ARRANGEMENTS

Some countries, including Norway, Finland, Belgium, Sweden, and to some extent Ireland engage in collaborative decision making practices at national and local levels. Shared decision making, or at least a strong influence on decision making by teacher unions, is a matter of structural arrangements. In Belgium Flanders, for example, all legislation regarding education is negotiated in tripartite between the Flemish government, educational employers' organizations and education trade unions. In such countries, according to survey responses, "Cooperation is a natural way of working." "We have a strong negotiation culture and most of the time we find consensus."

In these countries, teacher unions have frequent, often daily contact with ministry staff and members of government. They are members of working groups and committees established by the government with respect to educational issues. While teacher unions may not always agree with government, "We are used to sitting at the same table." There are shared understandings, and a shared discourse, about the importance of education. In Norway, "There is consensus that education is of utmost importance for the nation, and that teachers are the most important factor for student learning. Therefore educational issues are easily set on the agenda." In Finland, "If you look at the programs of the political parties from left to right there are not very big differences in education policy." In Belgium Flanders, "the number of social conflicts in education in recent years is very low." (Fill-in responses from EI member organization survey, 2012)

THE CASE OF SWEDEN

Sweden has a history of, and a legal basis for, close working relationships between government and all interested parties, at both national and local levels.As part of the Swedish political system, unions and other organizations and authorities receive government proposals ahead of their formal presentation in parliament, and are expected to comment upon them and recommend revisions. "It is actually part of our national law that this kind of structure has to be there, to get the whole society to look into government proposals. The government can never pass [anything] without doing this" (Interview with union official, December 2012). In Sweden, the government and teacher union leaders meet formally once a month but also see each other weekly during regularly scheduled seminars and are in frequent telephone contact. Continuous discussion may take the place of formal negotiations. The close relationships between government and teacher union officials mean that in negotiations, each party has a working knowledge of, and must respond appropriately to, others' perspectives and constraints.

The teacher unions' strength arises out of strong support by teachers: belonging to a union is a broad cultural expectation and over 80% of the teachers in Sweden are union members. Teacher unions' use the media and information gleaned from teacher focus-groups and school visits in developing strategies to persuade the government of their positions. And even when the government does not heed teacher union advice, it's important that the unions speak up "so we can say we told you so" when reform implementation is discovered to be problematic.

The current political party has been in and out of national office, but mostly in office, since 1936, and their current tenure stretches back to 2006. Working collaboratively is easier when a government has been in power over a period of time, so that union-government relationships can be established and knowledge relied upon. These close relationships can and often do lead to a common perspective on the issues: One Lärarförbundet union official said, "There is no conflict about what good teaching is. Where and if we disagree it's over managing where the money comes from." The nature of these close working relationships mean that, while some of the teacher unions have disagreed with the current government's moves toward greater centralization, union officials understand that seeking compromise would serve them better in influencing decisions the government is inclined to make. In some cases, both the government and Lärarförbundet have claimed responsibility for a reform idea, such as the recent initiation of a career ladder for teachers. Indeed whether this was a government initiative that the union chose to strongly support or whether the idea originated with the union is unclear.

The OECD's Programme for International Student Assessment (PISA) casts a long shadow over Sweden: Sweden's rankings have declined over the past ten years, and the gap between high and low achieving students has increased. According to close observers, when asked by members of the international community what might account for the decline in scores, Swedish officials are unable to account for this development. Several possible explanations are commonly provided for the apparent decline in educational quality. With about half of all secondary school graduates entering and completing university, teaching has plenty of competition with other occupations that require university diplomas. The education budget has been tight since the economic downturn in the 1990s and teacher salaries are not high. A voucher system that allows students to attend any school, public or private, exacerbates differences between schools by encouraging concentrations of high- and low-scoring students.

Asserting that some fault for declining PISA results lay with decentralization, the national government's position was to assume greater central control in the form of a number of educational reforms. The education minister expressed strong criticism

of the high degree of course choice and the secondary curriculum was restructured with the result that there is more of a distinction between vocational and general (university-bound) streams. To increase school accountability, students are tested both in more and lower grades than in the past. As in many other countries, Swedish teachers have experienced workload intensification as a result of larger class sizes and administrative tasks associated with the accountability measures.

Out of a general concern about teacher quality, teacher training programs have been the subject of "reconstruction". Recognizing that a sizeable proportion of teachers were teaching beyond their subject and age specializations, the government, supported by the teacher unions, established new certification requirements and is in the process of assessing the quality of every teacher training program in order to determine every teacher's qualifications. The teacher unions believe that a tighter certification system will drive up teacher salaries and encourage more young people to choose teaching as a career. In order to attract and retain teachers and to improve the status of teaching as a profession, a career ladder scheme for teachers, was established, providing additional salary for a new level of lead teacher ("lecktor") at a step between school and university teaching.

Swedish teacher unions have rarely directly challenged the government's positions on education reform. Instead they have sought to find places where government reforms could be supported in ways that would be to their advantage.

4. OFF AGAIN, ON AGAIN, OFF AGAIN

In some jurisdictions with histories of adversarial relations between education officials and teacher unions, there have been efforts to establish collaborative working relations. For example, in the United States since the 1980s, there have been a number of efforts, at the state and school district level, to establish enduring and effective structures for on-going discussions, problem solving and initiate educational reforms. Sometimes called trust agreements or Learning Laboratories, these structures, like England's social partnership in the public sector, simultaneously emphasised relationship building and substantive improvements to the conditions of teaching and learning (Bascia, 1994; Bascia & Osmond, 2012; Bascia, et al., 1997). One of the most common challenges to these arrangements was that the prevailing model of system reform that stressed centralized control, standards, policies that required compliance, and reduced funding for education put teacher unions in the untenable position of having to choose between support for their members and the maintenance of positive relationships with educational officials. The "revolving door" of educational officials and the fast pace of reform resulted in a volatile climate for the relational experiments.

THE CASE OF ENGLAND

England has had a checkered history of teacher union-government relations, with alternating periods of labour strife and relative harmony. This case study focuses on the most recent periods of antipathy, cooperative working relations, and conflict between teachers and government.

The national Labour Government, elected in 1997 on a platform of "education, education, education," created a School Standards Unit and national strategies focusing on literacy and numeracy. The top-down approach to educational reform and school improvement often alienated teachers who, in turn, were criticized for being resistant to perceived modernization. The new reforms required teachers to take on new administrative tasks: a study on teacher workload undertaken in 2001 reported that teachers spent about one-third of their time on non-teaching tasks. There was a shortage of teachers and principals. Teachers were unable to manage the reforms the government wanted to implement and teacher unions took industrial action in response to workload pressures. It became evident that reform efforts were plateauing and that something had to give (Carter, Stevenson & Passy, 2009).

A number (though not all) of the teacher unions undertook a dialogue with the government to discuss working in a less antagonistic way, which eventually resulted

in 2002 in a "social partnership" modelled after the collaborative relations between government, local employers and teacher unions. The resulting collective agreement in effect restored teacher unions' rights to national level negotiations which had been removed in the mid-1980s.

The social partnership began its work by addressing concerns about teachers' workload, but discussion extended to focus on teacher pay and performance management. The social partnership became the steering committee for a pilot project involving nearly three dozen schools focusing on changes to school workplaces to resolve teachers' workload concerns. By 2010 the social partnership was meeting on a weekly basis, with frequent phone calls and discussions among union and government officials.

Out of the social partnership came increases in per pupil funding and training for teaching assistants that were intended to increase teachers' capacity to manage classroom change. A new performance management regime was developed by the social partnership, with unions working to ensure that it worked for their members. Information obtained from teachers in their local contexts informed the social partnership's decisions. Local workload agreement management groups were established.

The social partnership lasted from 2002 through the end of the Labour government in 2010. Participants suggest that efforts were made to build trust, by delineating the scope of the issues that could be discussed and negotiated in such a way that both the teacher unions and government could achieve satisfactory results. Perhaps as a result, the social partnership did not evolve past a focus on traditional union-employer labour, or "bread and butter," issues of salaries and working conditions. It nonetheless evolved into a body that discussed a wide range of educational issues. It had a practice of privacy in order to protect the delicate nature of negotiations within the partnership from being influenced by either public or teachers' interference. For the unions within the partnership, this was a special era where for the first time they could participate in making policy. Some observers believed there was a trade-off: in order to sustain shared understandings and positive working relations among the various unions, the government, local authorities and their audiences, there was a loss of attention to real differences in needs, values and power bases among different teacher constituents. It was difficult to maintain pluralism in the context of the social partnership.

When the Conservative government came to power in 2010, it immediately passed a new Education Act under emergency legislation and abolished the social partnership. It was replaced by an Education Forum that met once every half term and involved presentations by civil servants. According to one union official who had participated in the social partnership, "They speak at rather than with teacher union staff. They

will listen to you and then they carry on because they can. The unions have no leverage with the government" (Interview, union official, May 2012).

Conservative education reforms include a revision of the national curriculum, a new inspection scheme, and a breaking up of the national pay and conditions negotiated through the social partnership. Funding of local educational authorities has been reduced and with it, according to union officials, the adequacy of support for school reform.

> *The government believes the state has failed and that schools should be independent and autonomous which will promote better results. [The local authorities are] still in place but decimated of staff so they can't do what they need to. Schools must remove themselves or be forcibly removed from the control of local authorities since, if they're run by a local authority, they can't be any good. (Interview, union official, May 2012)*

In the first two years of the Conservative government, nearly every teacher union voted to engage in national industrial action. As in many countries, English teachers are only permitted in law to challenge the terms of their conditions of service, not policy, and thus trade disputes focused on pay and pension cuts, increasing workloads and less job security.

As a result of these disputes, the media has claimed that teachers are not as committed to their students as they should be, and that teachers were motivated by their own vested interests.

> *Every day you can pick up any newspaper and there'll be a story about schools that blames teachers, or about something else entirely which says that the root cause of the problem in our society is teachers. The government's "no excuses" mantra means you can't have serious discussions around the factors that impinge on educational performance, like poverty. This government has offended the majority of teachers (Interview, union official, May 2012).*

5. BUILDING BASIC SYSTEM STRUCTURE

Teacher unions in developing countries may play a significant role in establishing and ensuring basic educational infrastructure by working directly to bring local teaching and learning conditions to the attention of central government. Uganda, for example, faces a situation of inadequate school buildings and teaching supplies. Families are unable to pay children's school fees or ensure they are well fed. There is a lack of sufficient teachers and the load placed on teachers is very heavy. Teachers lack the ability to implement curriculum changes. In addition to working to reduce the magnitude of these problems, the Uganda National Teachers' Union (UNATU) also attempts to ensure both that teachers, many of whom travel many kilometres to reach school, are paid a basic salary, and, on the other hand, that schools actually have teachers.

THE CASE OF SOUTH AFRICA

South Africa is a jurisdiction the teacher unions are significant players in the nation building effort, in terms of the work they do directly to build basic infrastructure.

During apartheid, in which the official policy was racial and ethnic segregation and discrimination against black South Africans, teacher unions were segregated along racial lines. In the 1980s, multiracial, politicized teacher unions emerged as part of the struggle against apartheid. One of these became the South African Democratic Teachers Union (SADTU). The National Professional Teachers' Organization of South Africa (NAPTOSA) was established post-1994 from a number of previously segregated unions. SADTU is part of a large federation, the Congress of South African Trade Unions that has close ties with the African National Congress (ANC), the organization that led the movement against apartheid.

Since 1994 and the end of apartheid, South Africa has been preoccupied with building a new educational system with new policies and structures intended to counter old inequities. In 1994 the Interim Constitution established educational governance and administrative structures at the national and provincial levels. In 1996 the National Educational Policy Act required the government to consult with teacher unions and other educational stakeholders formally, as a prerequisite to passing any educational legislation. The Labour Relations Act ensured that teachers (and all employees) had the right to collective bargaining and to strike. SADTU saw a huge increase in members. NAPTOSA fragmented as Afrikaans educators withdrew and formed SAOU. Currently SADTU is the largest union and represents more than 65% of organized teachers;

it and NAPTOSA are racially mixed; and Suid-Afrikaanse Onderwysersunie (SAOU) represents Afrikaans-speaking teachers in the main.

With relative stability over the past decade and a half, the teacher unions have been able to expand their services to teachers and to increase their influence over educational decision making. Over time there has been greater cooperation among the unions and less of a dichotomous sense of trade unionism vs. professionalism among the organizations.

The relationships between unions and the state are complex both with respect to labour relations and educational policy. For example, the 2000 curriculum review took up many of the implementation issues identified by unions arising out of earlier curriculum policies. At the same time, in 2002, unions were not on the national curriculum review committee. In a more recent example, there has been some public discussion that the government is interested in making education an "essential service," which would make teacher strikes illegal.

The government's adoption of neo-liberal economic policies such as privatization schemes and cost cutting measures in the mid-1990s led to tensions with the teacher unions, and South Africa has not been immune to types of reform that emphasize new forms of management, teacher accountability and outcomes-based curriculum (Chisholm, et al., 1999). In response, according to analysts, teacher unions have adopted a strategy that retains traditional features of unionism but at the same time recognizes the need to address issues of productivity and efficiency, and mechanisms for performance management, discipline and dealing with incompetence (see Torres, et al., 2000). The teacher unions defend members' interests but also are encouraged to work in partnership with government in developing policy and to uphold standards of "professionalism" (Govender, 2004).

With South Africa's new post-apartheid era has come the need for educational development, particularly around poor and rural areas of the country. There are major discrepancies in school completion and examination scores across provinces and districts. In some locations, only a minority of students stay long enough to finish secondary school. School buildings, class size, teachers who can effectively teach in the official languages of instruction and who have the conceptual capacity to implement new curriculum and other reforms are all issues, as are low literacy and numeracy levels, teacher morale, child and family poverty, the quality of teacher training and the provision of professional development.

Unions in South Africa have taken a key role in these areas, contributing to the broader educational enterprise and collaborating to support important initiatives,

filling in, for example co-convening with government an educational summit in 2009 that established an integrated framework for all teacher professional development. Unions have pioneered new approaches to teacher appraisal and professional development. SADTU and NAPTOSA have established a professional development institute to develop strategies for widespread deployment of teacher learning. Working with NGOs, universities and the government, South Africa's teacher unions are an active part of the greater educational system.

6. ENHANCING EDUCATIONAL CAPACITY

Some teacher unions, both independently and in collaboration with government, have set upon "political projects" to increase teachers' professional capacities. In Australia during the 1990s, for example, the Australian Education Union and the Independent Education Union negotiated a "Teacher Accord" with the Commonwealth Government, detailing their commitment to supporting professional development, curriculum assessment and research project. Several Australian states and state-level teacher unions incorporated these priorities into their collective agreements. The Accord "encouraged school reform, a move toward professional standards, and some greater salary scaled across the profession ...

"[But] the return of conservative governments in most Australian mainland states [and] industrial confrontations between governments and teacher unions... [saw] the collaborative endeavour between unions and employers for teachers' professional development begin to fracture." (Sachs, 1996, 265-66; also Burrow, 1996)

THE CASE OF ALBERTA, CANADA

With the Conservative Party in office for over 40 years, the Canadian province of Alberta has one of the longest standing governments in existence. Alberta's economy has been particularly vulnerable to the pressures of global market trends because of the province's heavy reliance on the export of oil and gas resources. Thus, in the 1990s, when many other provinces were significantly increasing investments in education, Alberta educators experienced a combination of rising expectations and shrinking resources in the wake of a drastic drop in the international price of oil. Severe cutbacks in government spending and the downsizing of the public enterprise became the norm as the government went about reinventing itself along entrepreneurial lines. Teachers were dismissed as a special interest group and the relationship between the Alberta Teachers Association (ATA) and the government became increasingly hostile (Mackay & Flower, 1999) as the organization endured "government by ministerial choice, rather than the concept of public policy" (interview with union official, September 2012). The ATA, which represents all of the teachers and administrators in the province, was particularly concerned with under-funding and large class size. These issues were sticking points for teachers and the ATA that resulted in a two-week province-wide strike in 2002, "the biggest crisis for the administration [of Premier Ralph Klein] over more than a decade" (Interview with union official, September, 2012). Since that strike, however, there has been a significant transformation in the ATA's relationship with the Alberta government.

The ATA now works with the Alberta government on several collaborative projects, beginning with the Alberta Initiative for School Improvement (AISI) created in 1999. A partnership project between the ATA, government, and other educational stakeholders, AISI places teachers in the "driver's seat of educational change" through localized, teacher-led research projects. AISI project evaluators reported that AISI

> *constitutes a world-class and world-leading example of a system-wide educational strategy. This strategy, designed by Alberta Education and its partners, inspires teachers and administrators. It enhances their professional growth and enthusiasm. AISI seeds new, research-informed practices within local communities, and then spreads them across districts and schools; and it diffuses existing knowledge as well as creating new knowledge. (Hargreaves, et al., 2009)*

The program represents a sharp contrast from the events of the previous two decades both in terms of its heavy investment in educational funding and its collaborative spirit. "That kind of culmination project, something that was a successful venture, it creates more successful ventures and trust builds up" (Interview with union official, October 2012).

Other collaborations have evolved as offshoots from that trust. In some instances, where there are common interests or interests that intersect, the ATA has sought funding from the government to support specific initiatives such as a new project on cognitive coaching for beginning administrators. The ATA also sits on the advisory board for the government's new inclusive education program in addition to sitting on advisory councils for other organizations that have received ministry funding. The government has also directly sought the services of the ATA in taking on responsibilities for a section of teacher certification. This is a dramatic change from ten years ago when the ATA was "persona non grata". The government now views the ATA as "a valued partner in the development of different projects…someone who adds value to those conversations and brings something to the table in terms of our expertise, our networking, or our infrastructure" (Interview with union official, September 2012).

The evolution of this relationship did not happen in spite of the adversity of the Klein years; it happened *because* of those challenging circumstances (Bascia, 2008). In many jurisdictions, a hard right turn by government shuts unions out of the policy process. But in Alberta, the ATA viewed the governments' comment on the poor quality of the province's education as an opportunity to fill the gaps created by reduced infrastructure and government funding, and become a strong advocate for improved public education on a broad scale.

Seeking support for its members and political advantage for itself, the ATA has capitalized on the ideas of others and worked in whatever arenas that are available. The ATA attended government-initiated regional meetings in 1993 even though it was clear that "the government has already made up its own mind" and consultation was merely a "charade" (Flower & Booi, 1999, p. 126); a relationship that other teachers' organizations might have refused. When the government released a position paper, "Meeting the Challenge," which reported on the results of the consultations, the ATA sponsored its own roundtables throughout the province, making them accessible to the public and then released its own report, "Challenging the View." In rebuttal to negative reports on the sorry quality of teaching released by Alberta Education, the ATA initiated an on-going, multi-level media campaign. It established a Public Education Action Centre in 1995 to develop an on-going, proactive campaign that would mobilize teachers in grassroots activities, promote positive changes in education, build effective coalitions and employ ATA members in schools and locals to promote public education in their own settings (Flower & Booi, 1999, p. 127, 129).

In addition to these public and political activities, the ATA attempted to fill many of the substantive gaps in educational practice resulting from the "decimated" educational infrastructure, particularly in the area of professional development. While other teachers' organizations have argued that it is the school system's responsibility to support teachers' work, the ATA has perceived such gaps as opportunities to challenge the government by asserting its own orientation to teaching and schooling. For example, supporting the government's interest in site-based decision-making but finding neither models nor technical assistance forthcoming from Alberta Education, the ATA developed information packets and professional development strategies for school staffs. When the government mandated individual growth plans (long-term professional development learning strategies) for teachers, the ATA "became the official source of information endorsed by the government" by seeking and winning the contract to develop workbooks and train administrators on their use, essentially defining their purpose and content ("they emphasize professional judgment, they're not just a check list"). Similarly, when the government legislated school councils in 1995, the ATA chose to support the plan and, with the assistance of other stakeholders, including the Alberta Home and School Councils' Association, it developed the official resource manual and provided "meaningful rather than trivial" training for school council participants, essentially managing to determine the shape of this reform (Bascia, 2009; Flower & Booi, 1999, p. 130).

Perceiving their mandate around educational reform as "thoughtful structuring of how education fits into the broader context of what we want in our society" (interview with union official, September 2012), a lot of the work that the organizational staff

undertake can be described in terms of "an opening of a conversation" between the association, its members, and government. This three-sided strategy hinges on direct political engagement that "allows members, over the long-term, to advocate on different reform issues" (Interview with union official, September 2012).

Engaging the general public in the discourse around educational policy and government platforms is also a priority. A brief scan of the ATA website, for instance, shows a variety of public advocacy documents, open access member's magazines, parent newsletters, and yearly research updates. These documents are all designed to initiate public dialogue and engage stakeholders at all levels in improving education over the long-term: "When you get parents and our members onside with an understanding of the issues and talking about the issues, all of a sudden it creates popular support for it, and that's going to start to push the politicians" (interview with union official, September 2012). This was of particular importance during the Klein years when the union was under attack. Launching a comprehensive campaign to challenge the negative reports coming from the government, the ATA worked to publically promote the idea that public education does work. Ten years later, there is a consensus on the value of public education in Alberta, so much so that "even the [Conservative] party that would push traditional reforms has to be cautious" (Interview with union official, September 2012).

The ATA's focus on research also has provided a platform for exerting the voice of the profession into policy discussions. Established in 2006, the division is still in its relative infancy but its impact on the ATA's relationship with government has been profound nonetheless. With "Incubator projects" (Interview with union official, September 2012), which can be used to substantiate the organizations platform on particular issues, the ATA's reach into research has been a process of capacity building and influencing government agendas. "Instead of saying, this is what we believe, we can say we've tested this and we know it works" (Interview with union official, September, 2012). For instance, the ATA's 2-year pilot project has examined an alternative approach for the evaluation of school principals. In another instance, when the government announced it was requesting feedback on the concept of learning coaches for inclusion, the ATA produced and distributed a discussion paper outlining characteristics and qualities of learning coaches, their roles and responsibilities as well as implications on current practice and conditions for thoughtful implementation. "We're trying to be pro-active . . . . so the Minister gets a copy with a letter . . . here's something we've been working on. . . . this is something we need to consider" (interview with union official, October 2012).

The ATA also recognizes "the power of collaborative discussions and being on the inside influencing things" (interview with union official, September 2012). ATA officials are interested in building relationships with government, regardless of the context of their work or their particular portfolio. An ATA official commented:

> *Sometimes other teacher unions stand outside and around the perimeter and make a lot of noise. Meanwhile, the meeting is happening inside a room and they're not included. . . . People have to value what you do and they have to do that by seeing what you do. And we believe that that has to happen through collaboration.*

In one of its most recent ventures, the ATA has developed an international partnership with Finland, another of the world's top achieving jurisdictions. Aiming to inspire a reciprocal exchange of ideas from both cultures that will directly impact teaching and learning at the classroom level, the partnership focuses on school level professionals rather than senior policy-makers, as is often the case with many educational partnerships.

The relationship between the ATA and the Alberta government has also been positively influenced by the relatively small size of the province's educational community. Relationships between unions and their governments are often a product of personal connections between individuals (Bascia & Osmond, 2012). In Alberta, an extensive network of personal relationships exists between various officials of the ATA and Alberta Education in an "everyone knows everyone" culture.

The movement towards an increasingly positive relationship, however, is a fragile process. Having just elected a new Conservative government, the ATA is in a "wait and see" mode. Anxious to hear the new Minister's platform, most officials, however, were optimistic that the "even when we don't all agree . . . we will keep coming back to the table" (Interview with union official, September 2012).

7. TEACHER UNION – GOVERNMENT RELATIONS AND THE NATURE OF REFORM

The current context of educational reform draws teacher unions and governments together but it also can pull them apart.

In the current context, when policy development tends to reflect global educational reform priorities, there has been a deterioration of quality in the conditions for teaching: reduced decision making authority for teachers; greater constraints placed on curriculum and pedagogy; increased surveillance; work intensification; fiscal reductions; and the diversion of educational resources from the public to the private sector (Robertson, 2012; Stevenson, 2007; Verger, et al., 2013). Under such circumstances, teacher unions must contend with the disconnection between the priorities of government and their responsibility to represent their teacher-members' occupational concerns.

In these situations, the balance between these relations with government and with members may be difficult for teacher unions to sustain. Case studies illustrate some of the various ways teacher unions attempt to achieve a balance. In Sweden, Lärarförbundet found common ground with government so that teachers' status could be raised. Similarly, in England during the social partnership, teacher unions and government came together in agreement over salary raises and improvements in working conditions in exchange for implementation of government reforms. In Alberta, with its highly democratic organizational structure the teachers' association acts as a conduit for bringing teachers' perspectives and issues to the table when working to develop jointly sponsored projects in which teachers and administrators take the lead.

In the cases where educational reform involves building infrastructure and capacity, teacher unions can be more substantive partners of government. Through their proactive involvement, teacher unions assert their right to participate in shaping educational reform. In South Africa, teacher unions take an assertive role in terms of ensuring basic material and human resources. In Alberta, the teachers' association has demonstrated its intentions to take the lead in increasing educators' ability to learn and improve their practice. In both of these cases, while there is some attention to the external reform context, there is also some clear attention to internally determined initiatives.

8. DISCOURSES OF TEACHER UNION - GOVERNMENT RELATIONS

Teacher union organizations and governments indicate their positions in relation to one another through discourses of reform. Language plays a significant role in framing the basic terms of social engagement. Discourses "constitute part of the resources which people deploy in relating to one another – cooperating, separating, challenging, dominating – and in seeking to change the ways in which they relate to one another" (Fairclough, 2003, p. 124). People share a discourse as a way of indicating, and reinforcing, the notion that they share a world view. Alternatively, entities such as teacher unions, or governments, can introduce and establish new discourses to indicate that the terms of engagement have changed.

In Sweden, teacher unions and the government have converged discursively around efforts to "raise the status of teachers." The logic goes that in order to reverse the decline of its PISA scores, teaching must improve if this is to be achieved. The number of university graduates who choose a teaching career is low, because teaching does not have special status in relation to other occupations. Raising teachers' salaries by way of a career ladder would demonstrate the government's "support for teachers" and signify that teaching is an occupation with career potential. For the teacher unions, raising the status of teaching is an attractive notion: the disrespect that teachers experience both collectively and individually must be mitigated. Demonstrated "support for teachers" is a welcome discursive strategy that justifies teachers' salary increases and could potentially be used to argue for other positive changes the conditions of teaching.

In England, the combination of reforms promoted by the previous government in the 2000s came to be known as the "new professionalism." Within this discursive frame, teachers' "special talents and skills," supported by pay raises, increased the amount of professional development, a reduced teacher workload and introduced more participatory practices at the school level. Elevating the position of teacher unions through the social partnership meant the development of a shared agenda, a shared set of understandings and a shared discourse around teacher professionalism. After the dissolution of the social partnership, the subsequent Conservative government's discourse about teachers shifted markedly, to criticizing teachers as being "shirkers," and "gratuitously offending the vast majority of teachers", according to a teacher union official. An official from another teacher union articulated his union's efforts on behalf of teachers as "reasserting or reclaiming the professionalism of our members. Teachers have been concerned that little by little their professionalism and their integrity are being chipped away at by a government that claims that teachers are just not up to the job."

This official linked teachers' professional commitment as a sense of

> *strong moral purpose. . . . Teachers are saying, 'We want to get on with the job of teaching and not to be diverted by unnecessary accountability and assessment protocols.' That's what we're about in terms of looking to reclaim our professionalism.*

An official from another union said, "There's nothing wrong with defending [the] terms and conditions [of teachers' work], you don't lose your conception of yourself as a professional and as an intellectual if you're also prepared to take industrial action."

In South Africa, nation building over the long haul is the persuasive concept that enables the government and the teacher unions to work in parallel. The government's document *Schooling 2025*, argued that "we must see . . . teachers who have received the training they require . . . [and they] understand the importance of their profession for the development of the nation . . . ." A teacher union official said,

> *We are a country in transition, a young democracy, and we are trying to find legitimate spaces to improve the educational system. It's a work in progress. (Interview, union official, August 2012)*

In Alberta in the 1990s and early 2000s, the provincial government's discourse emphasized the "sorry" state of the education system and teachers' insufficiencies. The Alberta Teachers' Association deliberately challenged this discourse and replaced it with one that characterized teachers as "trying to teach" and the problem as residing with the inadequacy of teaching conditions. Teachers' Association staff members were successful in persuading the government that they could serve as strong and cooperative partners with government. This discourse of collaboration and partnership was extended into recent negotiations in an era of shrinking educational budgets. In presenting the government's bargaining position, the Minister of Education wrote in an open letter to the presidents of the Alberta Teachers Association and Alberta School Boards Association,

> *There are far more areas where we agree than where we disagree. We agree that teachers are facing unprecedented diversity in their classrooms. We agree that to reach [our] vision, teachers need more support than ever before to truly transform our system and maintain our leadership role in education. And we agree that we need to do all we can to preserve our investment in education and in our kids. . . . We have one of the best systems in the world, and we are on the road to making it even better.*

In responding, the ATA president responded in kind by indicating both her displeasure at the province's salary offer and her willingness to continue to negotiate: "We've said no to the minister's offer, but yes to collective bargaining, and yes to fair solutions with locally elected school boards."

9. TEACHER UNIONS' INFLUENCE ON EDUCATIONAL REFORM IN THE CONTEXT OF UNION-GOVERNMENT RELATIONS

What constitutes educational reform across many nations around the world is remarkably similar – and remarkable in its sheer number and magnitude. The responses to the survey by Educational International member teacher unions suggest that the types of government reforms identified in the case studies are common. They are notable in terms of their sheer numbers and magnitude. In Spain, for example, a reform of the Education Law currently being discussed in Parliament proposes curriculum changes, increased assessment of student knowledge, a segregation of students into different streams, the promotion of private education, and links between school funding and external assessments. Australia faces "improperly resourced and implemented curriculum and professional reforms in the face of excessive top-down imposition of educationally unsound initiatives without adequate resourcing/PD and ever-increasing standardized testing with attempts to link this with teacher appraisal and pay" (Fill-in response on survey). The educational reforms with which Japanese Teachers' Union is concerned include a comprehensive reform of teachers colleges, national achievement tests, evaluation of teachers, educational vouchers, and the privatization of public education.

As the examples above suggest, teacher unions in many countries find themselves reacting against them, sometimes with little hope of influencing the outcome. There are some variations, however. In the cases described in this report, teacher unions have had some success in advancing their own agendas because of their close working relationships with government, in different ways and to different degrees.

When teacher unions and government share an educational discourse, unions may use the occasion of reform as an opportunity to influence its direction. In Sweden, for example, Lärarförbundet has joined with the government in supporting raising the status of teachers, initiating and endorsing reforms in career ladders and increased certification for teachers. Similarly, in England during the social partnership, teacher unions and government came together discursively around teacher professionalism and agreed to improvements in the conditions of teaching and raising teacher salaries.

Another form of active engagement by teacher unions is to work to support, modify or enhance reforms. For example, in South Africa, SADTU continues to work to develop professional learning strategies for teachers across the country so that they are well equipped to implement curriculum reforms. The teacher union in Alberta, similarly, has taken on the task of helping with the implementation of government reforms, such as school-based decision making. In doing so, the teacher union has been able to shape

the outcomes by tailoring the implementation strategy to their own values. For example, when the government mandated individual growth plans for teachers, the ATA developed workbooks and trained administrators on their use, defining their purpose and content.

One proactive strategy teacher unions can adopt is to initiate and demonstrate the appropriateness of reform initiatives of their own. Many unions accomplish this to some extent: for example, in Canada and the U.S., teachers have developed new professional development strategies, programs for students, and new courses, working through their unions to disseminate and, in some cases, see them enshrined in policy (Bascia, 2000). The Alberta Teachers' Association has been able to persuade the provincial government to support educational experimentation by teachers, as evidenced by the Alberta Initiative for School Improvement (AISI).

While government may play the senior partner in terms of policy development, teacher unions that enjoy close working relationships with governments are part of the policy development process. This is most explicit in cases where teacher unions are by formal legislation part of the development and decision making processes, but also the case in other jurisdictions where teacher unions and government have established positive working relations, however short-lived.

10. CONCLUSION AND RECOMMENDATIONS

Collaborative working relationships between teacher unions and governments occur in a number of jurisdictions around the world. In some places, supported by cultures of cooperation or by legal requirements, these relationships may be relatively stable. In other places they are more volatile, subject to change with the change of political or economic climate. In the current policy context, the combination of top-down reforms and economic adversity has resulted in many teacher unions reporting changes in relations or "mixed" relationships with government – neither entirely supportive nor entirely positive. For example, the Teachers' Union of Ireland reported that its "privileged access to senior levels of the administration is gradually being withdrawn." In contrast, in France under conditions of budgetary constraints, a newly elected government "has decided to put education as a priority." In Belgium, similarly, there are austerity measures, but "nevertheless we succeeded so far on limiting the effects on education in comparison to other sectors." These latter examples demonstrate something of the temporality of positive teacher union-governmental relationships.

Table 2 : **reported nature of quality of relationships between teacher unions and governments**

Education International member organization survey, 2012	
Relationship with government	**Frequency: out of 16 responses (some countries gave more than 1 response)**
Mixed	9
Guardedly positive	3
Highly positive	3
Hostile	1
Minimal	1

Positive teacher union-governmental arrangements are fragile. Structural assurances for consultation are not always sufficient in ensuring collaborative relations. Enduring interactions appear to be more a matter of a culture of cooperation, on the one hand, and the cultivation of strong personal relationships, on the other. For teacher unions, because of the magnitude of governmental political capital, they require constant attention, maintenance and vigilance; their existence can never be taken for granted. For governments, sharing authority and to some extent control can take some getting used to. For teacher unions, it is often a challenge to maintain some equilibrium between teachers' professional issues and working arrangements with government.

Sustaining union-government collaboration

Both teacher unions and governments should recognize the value of establishing and maintaining collaborative relationships. Whether attempting to minimize harm or playing a significant role in shaping educational practice, teacher unions provide an important counterweight to the influence of neo-liberal reform (Compton & Weiner, 2008).

Strong unions are part of the decision making landscape, not always dominant players but nonetheless influential. Productive union-government relations have the potential to extend the influence of teacher unions and to improve the quality of educational policy and practice.

Policy makers must recognize the important role teacher unions can play. The evidence demonstrates that they improve the implementation of reforms by providing feedback on the actual conditions of teaching and learning. Cooperative teacher union-governmental relations can also enable union participation in decision making itself. These relationships enhance the building of infrastructure and capacity by enabling teacher unions and government efforts to compliment and parallel each other or even to collaborate on reform.

Official, legislated requirements for union-government interactions and negotiated agreements help ensure the endurance of productive relationships. These arrangements require a genuine commitment to shared decision making and on-going personal interaction between union and governmental officials and staff.

Focusing teacher union priorities in union-government relations

Teacher unions must ensure that they keep their organizational ears to the ground with respect to teachers' issues and concerns. What teachers want from their unions, and what unions are uniquely able to ensure, is consistent with what Bangs and Frost (2012) identified as crucial to building teacher capacity, or what they call teacher leadership: opportunities for teachers' professional development and learning, establishing teachers' right to participate in decision making, articulating and promoting a positive professional identity, and quality conditions for teaching and learning (Bascia, 2008b).

Teacher unions can ensure the existence of these factors not only in terms of the focus of their collaborative efforts with governments but in what they provide themselves. Teacher unions have the demonstrated ability to engender these factors within their own organizations, whether or not the government of the day is interested in collaboration.

Teacher unions should recognize the power of discourse to influence policy directions, to sustain or to shift the dynamic relationship between unions and government.

Keeping international attention on teacher union-government collaboration

Education International should foster the expansion of teacher union-government cooperative relationships. The organization's worldwide scope, research capacity, and advocacy role can be put to task

- Promoting reform ideas that strengthen teacher capacity and articulating its primacy in ensuring quality education;
- Promoting the idea of union-governmental relations while paying attention to issues of pluralism;
- Articulating the important and necessary role of teacher unions in ensuring quality conditions in teaching and learning;
- Tracking international trends in union-government relations and the impact of world reform patterns; and
- Conducting research that allows local jurisdictions to learn from cross-national and –jurisdictional comparisons.

APPENDIX A: RESEARCH SPECIFICATIONS

The research reported here was undertaken between April 2012 and March 2013. It was undertaken by Nina Bascia and Pamela Osmond, of the Ontario Institute of Studies in Education at the University of Toronto, on behalf of Education International.

The research draws from existing literature on teacher union and teacher union-government relations, as well as on data collected for the explicit purpose of contributing to the report.

Four jurisdictional case studies were developed with interview data providing the primary source of information. The case study jurisdictions were selected by the research team and Education International on the basis that they provided some variation in the nature of teacher union-governmental working relationships.

The case studies focus on Sweden, England, South Africa, and Alberta, Canada.

A survey was sent out to all Education International member organizations. A sample of sixteen organizations returned completed surveys and their responses were taken into account in various parts of the report. The study cannot be taken as a full portrait of current teacher union-government relationships across the globe, but the case studies illustrate some of the kinds of active relationships. Union officials from the following teacher unions were interviewed are:

- Alberta Teachers Association (ATA) (Canada)
- Association of Teachers and Lectures (ATL) (England)
- Lärarförbundet (Sweden)
- National Association of Schoolmasters Union of Women Teachers (NASUWT) (England)
- South African Democratic Teachers' Union (SADTU)

Education International member organizations whose responses are included in the report are:

- ACV-OpenbareDiensten-CSC Service Publics (Belgium)
- American Federation of Teachers (USA)
- Association of Secondary Teachers (Ireland)
- Australian Education Union (Australia)
- Canadian Teachers' Federation (Canada)
- Centrale des syndicats du Québec (Canada)
- Federacion de Ensenanza (Spain)

- Irish National Teachers' Organisation (Ireland)
- Japan Teachers' Union (Japan)
- Lärarförbundet (Sweden)
- National Education Association (USA)
- Opetusalan Ammattijärjestö (Finland)
- Syndicat national des enseignements de second degree (France)
- Teachers' Union of Ireland (Ireland)
- University and College Union (UK)
- Utdanningsforbundet (Norway)

The International Summits on the Teaching Profession (ISTP), in 2011, 2012 and 2013, also provided important background information on international trends in teacher union-government relations. Countries that sent delegations (including heads of teacher unions and ministers of education) or participants to the conferences have included:

- Belgium Flanders
- Brazil
- Canada
- People's Republic of China
- Denmark
- Estonia
- Finland
- Germany
- Hong Kong SAR
- Iceland
- Indonesia
- Ireland
- Japan
- Korea
- New Zealand
- Netherlands
- Norway
- Poland
- Scotland
- Singapore
- Slovenia
- South Africa
- Sweden
- Switzerland
- United Kingdom
- United States
- Taiwan

APPENDIX B: SURVEY OF EDUCATION INTERNATIONAL MEMBER ORGANIZATIONS

FALL 2012

There were 16 survey responses, representing 12 countries. Total responses under any heading may total more than 16.

Sector Represented	Frequency: out of 16
Pre-School	11
Primary	12
Secondary	14
Higher Education	12
Further Education	3

Staff Representation	Frequency: out of 16
Teachers	16
Administration	9
Support Staff	9

Regional Representation	Frequency: out of 16
Asia-Pacific	2
Europe	10
North America/Caribbean	4

Issues of Concern	Frequency: out of 16
Basic Educational Services	13
- education for all	3
- aboriginal education	2
- professional development	2
- early childhood education	2
- core curriculum standards	1
- educational quality	1
- student leave rates	1

Issues of Concern	Frequency: out of 16
Funding for public education	16
- Fighting cuts	8
- Increases needed	4
- funding for marginalized students	2
- equitable funding	1
- changes to tax structures	1
- funding for infrastructure	1
- funding for materials/equipment	1

Quality teaching conditions	16
- teacher workload	7
- class size	4
- salaries	3
- improved infrastructure needed	3
- professional development/resources	2
- teaching in remote areas	1
- teacher bashing	1
- teacher benefits	1

Educational reforms	15
- testing and assessment	10
- curriculum policy	9
- teacher/school appraisal policies	7
- teacher certification/teacher ed.	5
- professional development	4
- poor implementation problems	3
- top down nature	3
- bullying policies/programs	1
- school choice reforms	1
- community partnerships	1

Sector Represented	Frequency: out of 16
Reforms related to school structures	13
- fighting privatization	9
- concerns about business influence	3
- the rise of independent schools	2
- school patronage	2
- distance education	1

Reforms related to school funding	14
- fighting cuts	5
- teacher pay	2
- early childhood education	2
- equitable allocation	1
- funding from businesses	1
- issues with private funding	1
- teacher education	1
- achievement based funding	1
- school discretion over budgets	1

Relations with members	12
- communication	5
- recruiting	2
- engagement	2
- social media	2
- difficulty with members	2
- school visits	1

Relations with government at all levels	13
-collaboration	2
- negotiation	2
- declining relationship	2
- conference participation	1
- boosting union profile	1

Collaborators	Frequency: out of 16
Trade unions	11
Government	9
Parent/community/student groups	8
Other teacher organizations	8
NGO's	5
Employers/School boards	4
Special interest/advocacy groups	3
Academics/University	1
Private groups	1

Working Against Unions	Frequency: out of 16
Right wing political parties	8
Employers/school boards	8
Right wing foundations	4
Right wing media	4
Other unions	3
Individual principals	2
Market studies groups	1
Private school owners	1

Opportunities for union agenda	Frequency: out of 16
New government/policies	6
Networking	6
Austerity measures (illustrate need)es	4
Collaborative projects	3
Shifts in public thinking	3
Good test results	1
Teacher shortages	1
Population growth	1
Communication advances	1
No opportunities	1

Impediments to union agenda	Frequency: out of 16
Funding cuts	11
Right wing government/policies	8
Right wing media	4
Restrictions on collective bargaining	3
Testing culture	2
Private enterprise in education	2
Policy borrowing	1
Other unions	1
Needs in other areas of public spending	1
Student needs	1
Internal issues	1

Relationship with government	Frequency: out of 16
Mixed	9
Guardedly positive	3
Highly positive	3
Hostile	1
Minimal	1

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ISBN 978-92-95100-51-0 (Paperback)
ISBN 978-92-95100-52-7 (PDF)