



Union |
Education | Headquarters



Trade union education at IG Metall

Information on the Foundations,
Objectives and Methods
for International Partners





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**Information on the Foundations, Objectives
and Methods for International Partners**

Inprint

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Foreword

Dear colleagues,

Cooperation instead of competition was the founding ideal more than 150 years ago when the first trade unions were established in Europe. At that time cooperation also always meant learning together: with each other, from each other and for each other! This process of practical learning and work kindled a solidarity that had to be experienced individually before it could become a fundamental value in the global trade union movement. Today it is more important than ever to nurture and develop this solidarity in the global context.

Since these historical beginnings it has been clear what trade unionists throughout Europe and the world want: social, just and economically stable conditions based on the foundations of good work as well as an educational and training system which creates equal opportunity and offers young people multiple options for the future. Many people all over the entire world have been working together with their trade unions to this end for decades. These are the people making a practical contribution to a peaceful world, tackling this task each and every day of their lives.

Economic, ecological, but also above all social questions and aims are not limited to individual nations today. Trade unions increasingly have to be



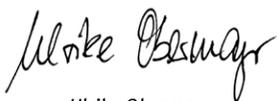
Ulrike Obermayr



Tom Kehrbaum

able to act at the international level in order to confront these challenges on behalf of the employees they represent in a transnational world. This is where trade union education plays a key role.

This brochure is intended to provide our international colleagues and our international partners in the field of education insight into the foundations, objectives and methods employed in our educational work. It is hoped that this will facilitate and stimulate joint educational processes and projects. We hope you enjoy reading the brochure and are already looking forward to the next encounter, at which we will continue to work for international solidarity in a very practical manner.



Ulrike Obermayr,
Director of Trade Union
Educational Work under the
Executive Board of IG Metall



Tom Kehrbaum,
in charge of international
education

Guiding philosophy of the Department for Trade Union Educational Work under the IG Metall Executive Board

The operational field of trade union educational work under the Executive Board of Industriegewerkschaft Metall is a key nodal point in the network of trade union and social-policy education at IG Metall.

Under § 2 of its Statutes, “IG Metall has ... the task of fostering and promoting the economic, social, occupational and cultural interests of its members. Trade union educational work helps make sure the trade union and individuals remain capable of effective action, equipped to engage in dialogue and achieve their aims while successfully asserting themselves in company, social and political issues, struggles and disputes”.

We base our actions on the values and ideals of the trade union movement. We respect ways of thinking which differ from our own in our work for solidarity, social justice and a thriving democracy.

Our work is focused on strengthening and further developing co-determination in business and society. We help design critical, emancipative educational processes in which technical, methodological-social and political-strategic skills can develop. This includes the ability to conceive of utopian ideals and adopt a critical stance towards existing power constellations as well as the development of skills with which to take action and the ability to engage in and deal with conflicts. Learning and change are life-long processes which we support with our programmes.

We see ourselves as an operational area whose task is to promote and further develop the educational work of IG Metall along these lines. Our assignment is to encourage critical debate over future educational needs of our seminar participants and active trade unionists while contributing a theoretical and practical impetus and foundations for the further development of educational work.

We offer interested members of IG Metall, institutions representing the interests of staff at companies in cooperation with training centres, regional offices, local offices and regions of IG Metall a comprehensive range of trade union and social-policy educational programmes to help establish foundations and cultivate an action-based focus by participants. We support the development of a common understanding of central points, contents and thrusts in the educational work of IG Metall through continuous exchange and discussion.

Our customers are primarily the Congress and the Executive Board of IG Metall along with its resolutions on respective focal points and aims of the organisation. In addition, we react to the needs and requirements of companies

and local offices of IG Metall in our work.

All of the staff on our team have technical qualifications, practical skills and experience in trade union and in trade union educational work. We are familiar with current developments by virtue of continuous further training, contact with the actors involved in educational work



and the bodies and special departments of IG Metall. Our interaction both in our team and in our contacts to the outside world is marked by respect, recognition and collegiality. Ideas, suggestions and criticism are registered, reviewed and if possible put into practice.

At the heart of our work with our seven IG Metall Educational Centres is the creation and coordination of IG Metall's seminar programmes available throughout Germany. We develop participation-oriented model seminars that initiate debates and create an impulse. We support those persons in charge of education within IG Metall with materials for advertising educational programmes, advice and planning and in the development and publication of strategies. We offer continuing training programmes for full-time and voluntary moderators and make available background and working material.

We can render these services along the lines of the objectives we specify and to the benefit of our participants because we are able to make use of a broad, diverse network of active colleagues at IG Metall.

Learning in the educational work of IG Metall has been successful:

- when the seminar participants are able to reflect on their needs, interests and patterns of action.
- when they have gained the self-confidence to assume responsibility and represent their interests in a manner marked by solidarity with IG Metall.
- when they possess the knowledge to be able to assess company as well as political processes and are able to apply this knowledge in the field of practice in the interest of employees.
- when they have the courage to leave the comfort zone of familiar behavioural patterns, express their criticism and to think along utopian lines.



The work of this operational area has in particular been successful:

- when trade union work has been reflected upon in all working processes as a factor conditioning success and has been actively applied at IG Metall.
- when our topics, programmes and material for designing training processes and providing training advice is perceived and used by active members of IG Metall.
- when both seminar participants as well as persons actively involved in training work experience contact with us as something positive and helpful and like to approach us.
- when our members want to make use of IG Metall's high-quality educational programmes throughout Germany.
- when available resources are used in an optimum manner.

Trade union educational work at IG Metall – answers to 10 questions

1. Why perform trade union educational work? – What skills are to be developed or further developed?

The conditions in which company interest representatives operate are becoming ever more complex and complicated. The task of trade union educational work is to convey knowledge and skills which help interest representatives evaluate, assess and act in an effective and efficient manner. Trade union educational work contributes to the development of political yardsticks and creates an emotional tie between the members/interest representatives and the trade union organisation.

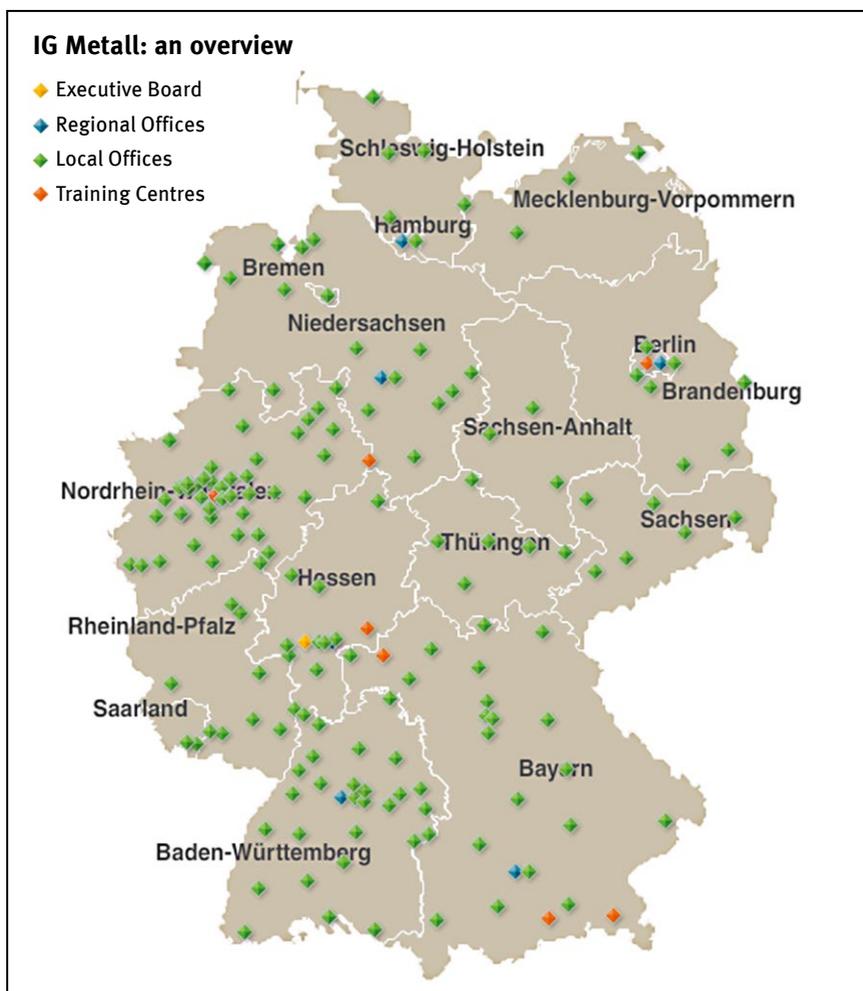
The following skills are at the centre of attention in further education:

- technical skills
- political skills
- social skills
- methodological skills
- transnational skills

Around 6% of the entire income from trade union dues is invested in trade union educational work!

2. To whom is trade union educational work offered?

Company interest representatives are at the centre of trade union educational work (70,000 members of works councils, 3000 representatives of youth and trainees and 70,000 shop stewards). In addition, interested members are also able to take part in seminars and workshops.



3. Where does trade union educational work take place?

The main focus of trade union educational work is at the following *three levels*:

- company/local level
- regional level
- central level

Seminars at the local and regional levels generally take place in rented buildings, at companies or at the local trade union office building. They last from a few hours to one week.

At the central level, seminars are offered on various topics at IG Metall's seven training sites. These generally last between 3 days and 2 weeks. Around 13,500 participants attend seminars at the training sites each year. 60,000 to 80,000 colleagues take part in seminars at the local and regional.

4. What contents are focused on?

The guiding motif is: clear – competent – cooperativ

Under this banner, *introductory seminars* are offered for newly elected trade union officers, works council members and youth and trainee representatives, addressing fundamental issues involved in representing interests at companies and in society. These seminars generally take place at the local level.

Newly elected works council members and shop stewards are prepared to properly perform their tasks in the training series “Works Council Compact” and “Shop Stewards Compact”.

They learn to inform their colleagues effectively, to take part in discussions, to provide information on fundamental interests and help make decisions in an interest-oriented, competent manner.

In the “Specialization“ seminar group, more advanced skills are learned in individual fields of action (economic committee; occupational health and safety, wage and performance, globalisation, the social state; youth, etc.

On top of this, there are a host of seminars on offer for company bodies (the works council of an enterprise, youth and trainee representatives) and for collective action groups (local youth or women’s committee) and special groups such as, for example, engineers and technical experts.





5. What methods are used?

The methodological-deductible skills of moderators are conveyed and further developed in basic foundations seminars. A host of different methods are used here. At the heart of these are methods based on practice and oriented towards action. These methods foster personal development in connection with societal practice. There are special methods of visualisation, analysis of topics, reflection and planning work. The content, form and practice of trade union educational work is further developed on an ongoing basis in a participation-oriented process.

6. Who performs the seminars?

The seminars are executed by “teaching staff” (approximately 55 in number), who are employed at the training sites, by “full-time IG Metall staff” (from local offices, regional head offices or departments under the IG Metall

Executive Board), by “voluntary moderators“ (approximately 1300) and by “external staff“.

Voluntary moderators are of special importance in this training system. They perform this activity in addition to working at a company (as works council members, workers or executive staff). They do not have any special education. That is why initial and continuing training of this group of persons is of great importance.

7. What materials and media are available?

The Executive Board department in charge of trade union educational work develops seminar strategies and brochures with more detailed information and on special current topics together with the training sites and the regional teaching groups. In addition, there is material to support publicity for training and documentation of seminars and events. A newspaper informs teachers about current developments and new strategies and methods.

8. What possibilities are there to receive leave from work to attend seminars?

Any employees who are interested (including those who are not members of IG Metall) can take part in the seminars. This is provided to members of works councils under § 37, section 6 of the German Industrial Relations Act because knowledge is conveyed which is necessary for the work of works council members. All other persons can take part under “training-holiday laws“ of the individual German Länder or in accordance with “training-holiday“ arrangements set out in individual collective agreements.

Under the German Industrial Relations Act, the employer is to bear the costs in connection with works council members. IG Metall bears the costs for participants attending in accordance with a “training-holiday“ law. Non-members bear the costs themselves.



IG Metall Training Centre, Berlin



IG Metall Training Centre, Sprockhövel



IG Metall Training Centre, Lohr



IG Metall Training Centre, Beverungen



IG Metall Training Centre, Inzell



IG Metall Training Centre, Bad Orb



IG Metall Training Centre, Schliersee

9. What are the training organisation and the training advice like?

If one understands initial and continued training as a process which takes place in several stages, the task is to plan the stages. By the same token, officers responsible for trade union education/training advisors have an important task. In particular they help motivate members and interest representatives to attend training events; they help them find the “right seminar“ at the “right point in time“ (from the perspective of the participants and the perspective of interest representation bodies).

They can moreover make a crucial contribution to the newly acquired skills and abilities being used in an optimum manner in company interest representation work and the personal sphere.

10. What arrangements are there for the training of IG Metall trade union officers?

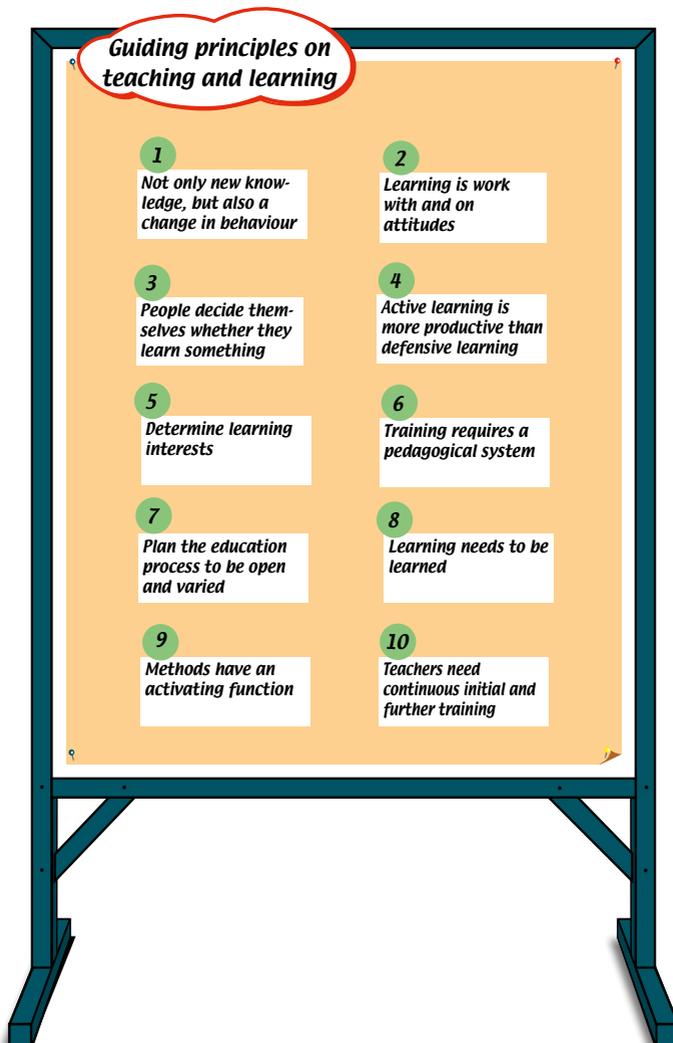
There are approximately 2400 colleagues employed at IG Metall. Around 500 at the headquarters level, about 200 at the seven regional head offices, approximately 1350 at the 163 local offices and roughly 250 at the seven training sites.

Training activities are at the heart of it all:

- “The search for talent“ before beginning full-time trade union work
- Trainee program/fostering the development of young colleagues
- Young trade union officers – familiarisation of new appointees
- Training for leaders/advice among colleagues
- Professionalisation of trade union officers on selected topics:
 - Company policy
 - Acquiring members
 - Occupational health and safety
 - Communication/data processing
 - Socio-political topics
 - Organisation of further training
 - European Academy
 - Exchange of staff at the European level
 - Global Labour University

Initial and further training of trade union officers must be viewed in connection with trade union educational work for members and interest representations. It is an additional type of educational work specially designed for this group of persons and tasks.

Ten guiding principles on teaching and learning in trade union educational work



Democracy – i.e. co-determination and participation to the greatest degree possible – is the political objective and aim of trade union action. IG Metall consists of its members and how they feel, think and act. New production systems, isolation of individuals at workstations and new management strategies require a new strategy of action from trade unions. This is how classic interest representation, which is based on acting on behalf of colleagues, has survived to the present. Nowadays trade unionists are moderators and organisers of collective movements at companies and in society, in which each individual is important.

We know today that learning imposed from the outside is very expensive, time-consuming and less successful. Research findings tried and proven in the field of practice show that education is most effective when it is guided by interests, subject-oriented and as self-guided as possible. This realisation has been reflected in the theory and practice of trade union educational work for many years now. The following guiding principles serve as an orientation for present-day training practice at IG Metall:

1st guiding principle: Training is successful when it not only conveys knowledge but also leads to a change in behaviour.

Participants in trade union seminars are dependent employees. They gain experience every day in a working world and living environment marked by competition and pressure to perform. The training work of IG Metall is guided by the objective of “learning from practice for practice“. This experience-oriented learning is intended to help participants be able to act successfully on company and social-policy issues, struggles and disputes. In addition to learning certain content, this also means acquiring work techniques and social skills. Participants examine their own attitudes, interpretations, per-

spectives and test different approaches in action-oriented teaching/learning sequences.

2nd guiding principle: learning is work with and on attitudes.

Trade union educational work aims not only at the formation of knowledge and skills, but also seeks to provide members and holders of office an orientation on political, historical, economic and social developments and encourage them to actively take part in trade union organisation and empower them to take political action with social issues, struggles and conflicts. Trade union education is therefore also always work with and on the attitudes of all participants, as individual attitudes serve as the foundation for orientation, assessment and motivation.

Teachers are assigned a special role in seminars in trade union educational work. They work in the area trade union educational work on a team, have highly developed social skills and are familiar with methods and techniques encouraging interaction based on solidarity. They initiate a joint search for solutions to problems faced at companies and in society every day - in which individuals should not be left alone in making decisions, but rather experience a common democratic formation of opinion as a process offering a better way.

3rd guiding principle: it is not the teachers, but the learners who decide whether they learn or not.

This guiding principle contains two aspects: first of all teachers are on the wrong path if they believe they can “impose“ or dictate opinions or simply feed information to participants. Teachers have the task, rather, of planning, structuring learning areas and supporting and motivating learners to

actively take part in the learning process.

Whether and how learners become involved in this didactic process is up to them, the reason being that – and this is the second aspect – learning presupposes a desire to learn.

4th guiding principle: active learning is more effective and sustainable than defensive learning.

We are all familiar with defensive learning from primary school. Here most learning objectives and content are determined from outside. Framework curricula dictate to teachers and pupils what is to be learned. Learning pressure is applied to pupils by giving them marks – their occupational and social advancement namely depends on these marks. This form of learning is



possible, but determined by outside forces; it takes considerable effort and is stressful for all those involved.

Active (or also expansive) learning, on the other hand, is based on learners. It maps their educational needs, enquires as to what they want, what benefits them and builds upon their existing knowledge and skills. This promotes individual strengths and interests.

We also know from learning and cognitive research that learning takes place individually and can only be influenced from outside to a certain extent. The greater the share of self-learning, the more effective and sustainable learning is.

Things which people enquire about themselves out of curiosity require background knowledge and skills. Asking questions is an art which learners are not always successful at immediately, as questions are not always obvious and need to be well formulated.

5th guiding principle: learning interests have to be determined.

In order to stake out the possible horizons of research and learning and be able to develop specific learning objectives, the connection to reality has to first be established and secured. By the same token, teachers have an important task. They help the learning group gather experience by introducing new methods presenting experience as vividly as possible, thus making it more easy to conceive of. After this, the task at hand is to put the results of the discussion in a structure and attach weights to various problems and requirements for actions. Only then can individual and collective questions and learning aims be specified for the respective training event.

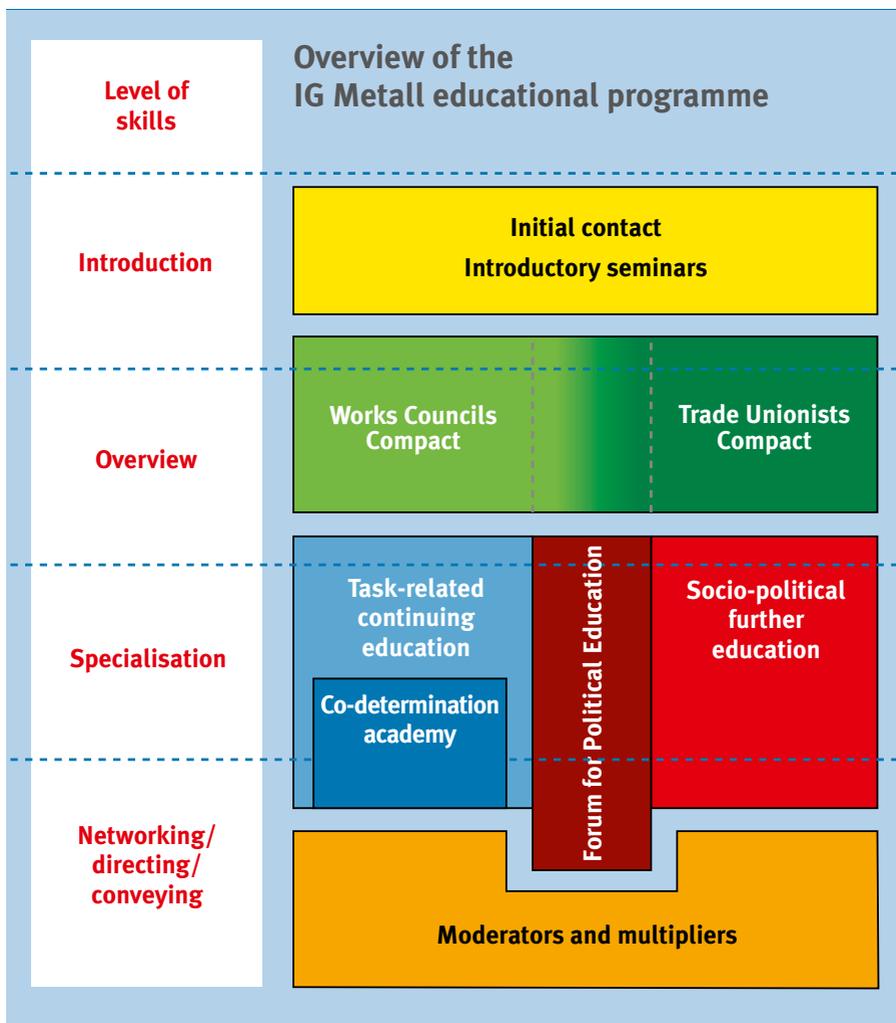
The experience of the participants plays a major role not only at the beginning of the education processes – it also serves as point of reference throughout the entire learning process: experience and everyday awareness are still being underestimated by only assigning these the attribute of “superficial recognition“. Anyone who looks and listens closely, however, will discover cognitive reduction in the statements and descriptions of the participants that help render the borderlines to scholarly science increasingly hazy. Moreover (and this is of special importance to trade unions), these perceptions and cognitive performance of participating colleagues often prove to be highly durable. Realising this is thus not only of major importance to the organisation, but can also be harnessed to other ends e.g. in its mobilisation and public-relations work.

6th guiding principle: education requires a pedagogical system.

Even if trade union educational work seeks to strengthen the roles of participants, trade union teaching and learning processes are systematically prepared and pre-structured. Specific work and life experience of the participants serve as the point of departure for analysis in the seminar. These can be used to establish reference points to reality, identify problems and questions.

This initial sequence is an orientation phase. It serves the purpose of identifying and formulating topics and questions for the following phase of analysis. During the latter phase, reality is analysed from many perspectives, additional information is drawn upon and problems are explored in depth.

In the third phase (the action phase), the results from the analysis phase are assessed. Do we want to continue to work and live in the same way, or



are there viable alternatives? This utopian question leads to a specification sequence. This serves the purpose of drawing conclusions from all the previous results produced by the seminar in terms of their implications for political action.

7th guiding principle: plan the training process to be open and varied.

The "planning variables" in training are the participants with their individuality, different skills and widely ranging everyday realities.

That is why it is important to think at different levels, to be prepared in actual and methodological terms for the unexpected and plan alternatives.

The most important categories in planning are the objectives. When seminar leaders distinguish between teaching and learning objectives, they can be sure that they are on the right track. Teaching objectives relate to the system processes of understanding and research methods. Learning objectives can only be developed with the participants jointly and projected ahead of time only vaguely.

Trade union educational work has adopted the notion of the "open" seminar. This means that loops, digressions and detours must be possible at any and all times in research.

Different learning types also need to be taken into account. Every young person and adult has different skills and learning experience. Some learn better by listening, others when they can imagine things in image form. Some have to hold things in their hands ("grasp it"), others think in terms of abstract models, etc. The task of the seminar leaders is to be aware of different paths of access – listening, seeing and doing – and to combine these in a subject of learning while making it accessible to participants.

8th guiding principle: learning needs to be learned.

Every learning process always also involves getting to know and practicing new forms, methods and techniques of work. In IG Metall educational work, its guidelines and initial and further training, we make sure that learning activities, work techniques and methods offer benefits to shop stewards and works council members in their everyday work. Thus, moderation techniques learned in seminars can also be used in company meetings. The use of imagery can enrich PR work, such as among other things use of the "blackboard"¹. Research and reading techniques are important in familiarising participants with new topical areas. Getting to know the system and benefits of social forms such as individual and group work enrich committee and assembly work at companies as well as forms of work in working groups at local trade union offices.

9th guiding principle: methods have an activating function.

Lectures, discussions of such afterwards and a more detailed study of the literature are techniques in teaching which are supplemented in trade union educational work by methods which empower participants to learn in a self-guided manner. This includes – in addition to independent information-gathering techniques – *imagery methods* such as drawings, collages, model-building, *drama*, case studies, staging and game exercises, and *literary* techniques as well as writing an article or flyer in preparation of a speech. Such methods are of a project nature and foster the planning, organisational and design skills of participants. At the same time they serve as a *model for different forms of action* in trade union work.

1 Bulletins pinned up by trade union interest representatives at the company.



10th guiding principle: teachers need continuous initial and further training.

Full-time and voluntary teachers not only require technical knowledge, but also need theoretical and practical initial and further training. This includes first of all a discussion of trade union policy topics and secondly the acquisition of didactic-methodological knowledge through practice and evaluation.

Model methods – Methods for getting to know one another

Welcome Diversity



Objectives

Make the persons attending and their different functions visible



Technique

The participants are requested to form a circle. When a criterion which is called out applies to them, they are to go to the middle of the circle. The others applaud. Whoever is standing in the middle looks at the people who are also standing in the middle and those who have remained in the outer circle.

- Everyone who is member of an EWC is requested to come to the middle.
- All of the EWC coordinators are requested to come to the middle.
- Everyone who knows their EWC coordinator, ...?
- Everyone who ...



Size of groups

Up to 50 persons



When can it be used?

Round of introduction or as an element of it.



Time required

Depending upon the number of questions, 5 to 10 min



Additional note

The explanation must be interpreted. Language skills of the speakers and participants should be used. This will work without simultaneous interpreting.



My workplace

Objectives

This exercise can be used to facilitate getting to know one another.

-  By the same token, the participants tell each other about their working lives.

Technique

All the participants have brought two pictures with them. One of their company/office buildings and another one of their own desk (without any person there). Each person keeps the picture of the building in their hand – the pictures of the desk are passed out. It is now the task of each person to determine to whom the picture of the desk corresponds. The persons present are called upon to contact as many other persons as possible in order to put the matching pictures (desks and buildings) together.



Size of groups

15 to 40 persons



When can it be used?

At the first meeting together in order to promote communication.



Time required

Approximately 45 min

Material

Two photographs each should be made before the beginning of the seminar and sent to the seminar organisers by e-mail so that the photos can

! be printed in time for the event.

Additional note

↻ If there is an odd number of participants, one the seminar organisers can fill in.

Variation

After the search is performed, the respective partners are introduced. Here the photos of the workplace are shown and a few traits explained to the other person (where one comes from, language, hobbies).



Breaking-the-ice/relaxing methods



Culture game

Objectives

The organised evening event together offers a contact and orientation point and prevents the formation of cliques. All the participants are visible and tell something about their country. Contact between countries and discussions.



Technique

Already when the invitation or the detailed seminar schedules are sent out, the participants are requested to bring something typical from their country with them. At the same time, it can be noted that it does not have to necessarily be something to eat or drink and that it really should only be something simple (that does not cost much). In the evening a time will be agreed upon to present the objects the participants have brought with them. In turn the participants are requested to present what they have brought in a few words (why they chose it, what is special about it?)

Experience has shown that in spite of being instructed as stated above, many participants bring food or beverages with them. Afterwards these things will be consumed together. This leads to relaxed discussions.



Size of groups



Up to 60 persons

When can it be used?



On the first evening of a seminar or workshop

Time required



1 – 2 hours

Material



A table for the objects the participants have brought along, glasses, plates, cutting boards, knives, CD player for music, etc.

Additional note

No interpreting. Language skills required on the part of speakers. Make



use of the pooled language skills of the participants. The rest can be done “in sign language”.

Lemon exercise



Objectives



- Exercises which sharpen perception and expression in language terms
- Makes participants more aware and helps them actively perceive the difference between prejudice/language generalisations on the one hand and exact observation/perception of uniqueness on the other

Technique



- At the beginning a brainstorming: “What pops into your minds at the mention of the topic lemons?”
- Collect 3 to 5 associations on a flipchart by calling out (usually the participants say: yellow, oval, sour ...)
- Everyone picks out a lemon and is supposed to feel it, smell it, examine it very closely.
- Each participant should give their lemon a name.
- After three minutes the lemons are mixed in a bag and then spread out in a pile in front of the participants.
- The participants are asked to find their lemons.
- In the case of disagreements, the disputed lemons are placed on the side and at the end of it all examined once again. Amazingly enough, all the participants (even in groups of 25) manage to found ‘their’



lemons without a problem.

Target group/size of groups

7 – 25 participants

When can it be used?

This exercise is an ice-breaker on the topic of individual and cultural differences. It is good to use at the beginning of a unit on stereotypes, differences, etc.



The assessment of the process can be used as the kick-off for additional discussions on topics such as ‘stereotype – uniqueness’, ‘prejudices – precise perception’, ‘typical – individual’ ...



Time required

About 20 min

Evaluation



Evaluation question:

- “How sure are you that that is ‘your’ lemon? How did you recognise it?”
- Reflection on the stereotypes of lemons cited before (yellow, sour ...).

Transfer

Questions:

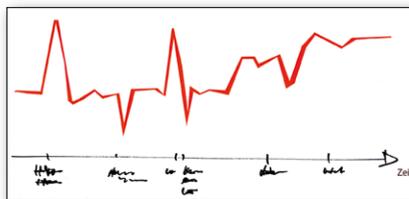
- “What are the parallels between this exercise and the differences between people?”
- “What stereotypes are of people with different colours of skin, etc.? How ‘equal’ do we perceive people with black skin or of Asian origin to be?”
- “What do such stereotypes mean to you?”



Preparation and material

Methods for analysing topics

- Flipchart
- A lemon for each participant
- A bag to mix up the lemons in



The initiative curve



Objectives

The members of the EWC should be shown the strengths and weakness of cooperation over the last few years.

Technique

A form (DIN A5) is handed out. The relevant data of the participants' own history (body, founding, first joint seminar, etc.) is entered on the time-line. Above these facts a curve is drawn manually showing individual initiative during these phases.



Size of groups

3 – 10 in the same EWC



When can it be used?

Processes of reflection can be stimulated in this manner for all the members of an EWC at meetings, which may be helpful for future work together.



Time required

Explanation 5 min., creative phase 10 min., discussion 20 min.



Material

One copy of a time-line (DIN A5) is required per participant. Coloured pencils, markers/pens

Additional note

The participants should know rough data on their own EWC history.



The seminar leadership should moderate the discussion phase in order to smooth any tensions. This method can be used before the “to do” exercise.

To do



Objectives

The aim of this exercise is to gather, analyse and note the different situations with which an EWC is confronted over the course of time with targeted intervention steps.

Technique

All the participants briefly reflect on what different problems they have had to deal with in their EWC career to date. Each of these problems is listed on an individual note card. After approximately 20 minutes the individual cases are read aloud and arranged on a pinboard in chronological order. If it is a topic which occurred during the founding phase of the EWC, it should be towards the top, if it only occurred later, it should be moved downwards. If it was a problem which was more internal to the EWC, it is placed further to the left, if the EWC was confronted with the problem from outside, the respective card is moved to the right. In this manner a matrix of different topical areas can be read from the pinboard. A brief description of this solution is then stapled to a coloured sheet for problems for which practicable solutions have already been submitted. Cases which have not been processed yet can be discussed in the plenary group.



Size of groups

Approximately 4 to 8 persons

When can it be used?

On the second or third day of a seminar, when the persons have already

-  built up trust and confidence, this exercise can be used to structure proposals for solutions from different areas and sectors in such a manner so that others can profit from this experience or can join in the effort to solve problems faced by others.
- 

Time required

-  Approximately 90 min.

Material

-  Coloured sheets DIN A5, pinboard, coloured pencils/markers/pens

Additional note

A trade union moderator should be present in the analysis of cases in order to help out wherever the group work does not produce any results.



Variation

The results can be summarised on a “to do” list. This can be made available to all the other seminar participants.

Role-play: contractual negotiations*Objectives*

Plan and carry out negotiations. Put yourself in the different roles of the individual negotiating partners.

Technique

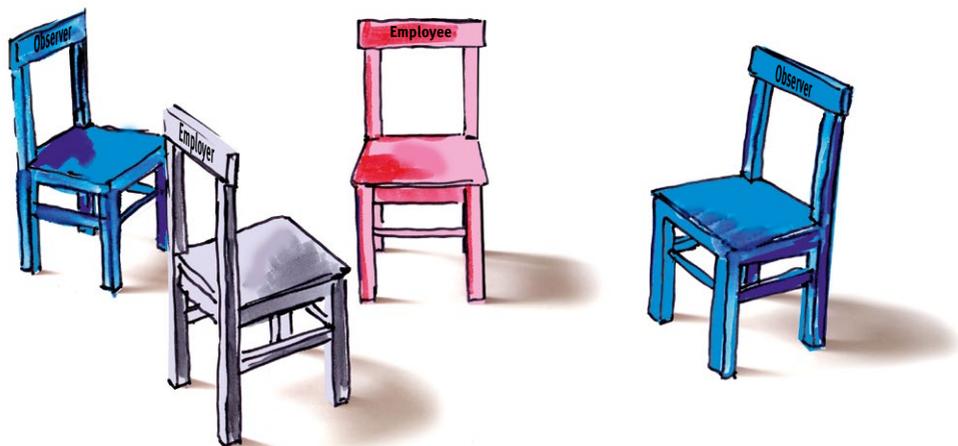
Four teams are formed – the representatives of the employees and the employer and one respective group of observers who observe the behaviour of their group in the separate preliminary discussions and the simulated negotiations. The group of employee representatives splits up into five works council members from the various branches and an EWC expert from the trade union in charge. The employer’s side is represented by five managers. The remaining participants in the seminar split up into two groups as passive observers of the employees and employer.

Each of the two interest groups receives a manual on their task in the planning game. The employer representatives are assigned the task of defending a proposed EWC agreement. The employee representatives, on the other hand, are given objectives in their negotiation manual which they are to attain in the negotiations.

The groups then go into separate rooms in order to discuss a strategy, arguments and possible modes of behaviour by individuals. After 45 minutes the groups get together again to conduct the negotiations.



After the negotiations, the participants reflect on the preparation and the



negotiations.

Size of groups

Up to 30 persons



When can it be used?

To prepare participants to found an EWC. To prepare negotiations.



Time required

30 min. working group, 20 min. negotiations, 20 min. evaluation and discussion



Material

Methods for reflecting on the seminar

Sheets stating the tasks for each group in the respective languages



Variation

The contents of the negotiations can be adjusted to meet respective needs.

Memoskop



Objectives

The most incisive results, persons or objects in the training programme are presented one again in a game-like setting.

Technique



A variant of Dalli-Klick is played in the form of a power point presentation. The persons attending see distorted images and have to guess how they are connected to the seminar. Text passages, diagrams or even pictures from social events can be viewed in this manner one after the other.



Size of groups

Up to 40 persons



When can it be used?

This exercise can be inserted at the beginning of the final plenary group in order to address the various topics once again.



Time required

Around 30 min. per EWC



Material

Beamer, laptop, photographs, charts, texts

Additional note

It takes about 1 hour to arrange the various image files for a sequence of 15 pictures. Each picture has to be stored on the laptop as a jpg file

and then distorted using an image-processing program. The 4 individual distorted pictures are inserted in a power point presentation one after the other. Each picture is blurred at first. Each following picture reveals more details.



Head – heart – hand



Objectives

At the close of the seminar, the relevant aspects which the participants



will remember should be reflected upon.

Technique

Each participant receives a form with 4 symbols: a head, a heart, a hand and a hand-shaking symbol.



After each symbol the participants should briefly note what they will remember, what parts of the event really moved them and what useful information they have received. After the fourth symbol the farewell typically used in each country should be written. This allows all of the participants to once again state their desires and suggestions in a final statement.



Size of groups

4 to 5 EBRs



When can it be used?

Als Abschiedsübung



Time required

Filling in the symbol form 5 Min, round of presentations 30 min.

Material

Felt-tip pens, ball-point pens, paper with symbols on it

Additional note

The exercise is suited for seminars lasting several days.

Glossary

General educational and trade union educational work

General education is based on the humanistic tradition of helping people become independent and assuming individual responsibility. Trade union educational work also seeks to promote individual responsibility, but views itself as linked to an organisation and obliged to offer "targeted training for social struggles". This means that it aims at strengthening members and office-holders so that they can act independently and in a partisan manner at companies and in society (along the lines of the Statutes and resolutions). To do this they first of all require an ability to be able to see the bigger picture and think in terms of interrelated factors – that is the aim and task of basic political education. Trade unionists, on the other hand, need technical skills in questions relating to law, occupational health and safety, collective bargaining, chairing meetings, moderation, etc. Special seminars convey the knowledge needed to develop these skills.

Cultivating awareness – can that work?

The notion of "cultivating awareness" is contradictory. Learning always takes place individually. Our awareness develops with our own overall individual development. In terms of educational science, little influence can therefore be exerted on cognitive and reasoning abilities, which are acquired in an all-embracing manner over a long period of time. Nor should one seek to exercise such influence, the reason being that if trade union educational work wants to make a contribution to fostering independence and individual responsibility, we cannot assume that young people and adults will (or should) allow themselves to be manipulated from outside. One positive and correct aspect of the notion of "cultivating awareness" can be harnessed for teaching purposes if teachers grasp that awareness only comes about

in action and reflection upon such action. For seminars this means that teaching-learning content must always emanate from the everyday practice of the participants; it must be critically examined in its various contexts and translated into well thought-out approaches and strategies towards action. Political training, as it were, goes deeper and further than everyday trade union practice. It offers a sort of "expanded openness to the world" and concentrates on specific utopian ideas.

Teaching should also pay heed to the principle of "positioning for action" in methodological terms as well. It is not only important to discuss this, but rather also to organise learning actions such as the use of visualisation and drama, planning games, experience-orientated methods, etc. – including in interaction between social organisational forms (individual and group work as well as phases involving the entire plenary group).

The dialogue principle

Highly developed human existence is not possible outside of the social context. Against the background of the concept of subjectivity, then, one can say: there is no individual existence, but rather only coexistence. Each and any question or issue involving human beings – particularly political ones – are not matters of individual, but rather collective, existence. Only mutual "opening up" can produce answers and options for various actions. Understanding is based on the principle of inter-subjectivity, on the principle of dialogue with other people. The dialogue principle in communication promotes commitment (active questions and listening processes), directly addressing and encountering others (interest in other persons) and a desire to learn from each other which is grounded in reality (fact before fiction).

Didactics

A strategy of critical – constructive didactics developed by Wolfgang Klafki has had a major impact on the didactics of trades union educational theory and practice. "Critical" means that education must relate to the everyday lives of the participants and reflect this. "Constructive" means that education must always focus on change in situations which are reflected upon while at the same time helping participants better grasp their everyday lives and change their social situations (emancipation) and have the effect of promoting democracy.

Learning objectives have priority in critical-constructive didactical strategies. They take into account elements of critical ideological importance and are marked by the social and political relevance of learning-teaching processes.

Orientation towards experience

Each and every seminar in trade union educational work is guided by the principle "from the field of practice, for the field of practice". People only learn when they really want to, which means that the particular topic and the focus have to offer real benefits to learners. Participants must perceive teaching and learning as helpful in dealing with their everyday realities. For trade union education, this means that participants should acquire an orientation towards action and skills on the basis of their experience for their trade union work at companies and in society. Experience is the connecting element between theoretical knowledge and social practice. Participants themselves know best about the elements of this experiential reality. They are the experts in their own domains. Teachers have the task of making in-

dividual experience available to everyone in the seminar, generalising it in discussions with the participants and steering the discussion to questions towards which the further course of the seminar work is oriented.

Basic trade union foundations and training of trade unionists

In the German education system there is a dichotomy between general education and occupational and further training. The former benefits above all higher social strata, while the majority receive functional initial and further training. Trade union educational work seeks to overcome this dichotomy, viewing politics as a broad field which not only relates to the actions of political and economic classes. The slogan is: "from the field of practice, for the field of practice". That is why trade union seminars are always seen as a form of political education, as they are based on specific cases bearing relevance to everyday life and by the same token include a political dimension. Basic political education, on the other hand, does not convey any abstract general political knowledge; rather, it proceeds from the experiential world of colleagues, placing politics in close relationship to individual and social conditions while exploring specific alternative actions.

Orientation towards actions

Orientation towards actions in educational work has two dimensions:

- It relates to a conceptual objective, according to which seminars have to offer benefits to the participants. Education must help them act more effectively and successfully (politically) at companies and in society in their everyday lives.

- Orientation towards actions has a methodological dimension in seminars. People learn best when they act. Thus methods and procedures must be used which lead the participants to act – on their own volition (project learning, visualising methods).

Interests

Perceiving one's own interests presupposes an understanding of societal relations as well as powers of assessment with regard to what role or function an individual is assigned or can attain in this society. Individual interests must accordingly be categorised and specified more precisely. Thus, for example, a distinction can be made between personal interests in private family life, interests in one's personal life and interests in working lives. Recognising individual interests leads directly to the question of defending individual and collective interests. Here a distinction can and should be made between individual interests and objectives and socially desired and necessary interests. Differences in interests are regulated by political institutions in democratic societies. Defending interests is thus closely related to power issues.

No room for Nazis or racists

From the perspective of trade union educational work at IG Metall, values such as solidarity, dignity, recognition and respect constitute elementary pillars of our society – whether this be in seminars or in everyday interaction with each other, in our private or working lives. It is not only because of our understanding of our own history that we devote a large portion of our work to the fight against discrimination and any form of group-focused enmity.

In times of great uncertainty this is more necessary than ever! Not only demagogues and right-wing groupings attempt to take advantage of anxiety among the population for their own ends. Some politicians in the so-called middle of the political spectrum also try to win support by offering simple solutions to complex problems – solutions which are as full of bias as they are wrong.

Racism tramples upon human dignity. Racism divides company staffs and society and thus stands in diametrical opposition to one of our most important trade union values – solidarity.

That is why trade union educational work at IG Metall supports the fight against right-wing extremism and any and all forms of discrimination through its seminars and by cooperating with various initiatives such as, for example, "The Yellow Hand" or "Respect! No Room for Racism".

Concept work

Guidelines are available for all seminars which are performed by voluntary moderators. These are developed and tested by fulltime educationalists working together with voluntary moderators. They offer an orientation in the preparation, execution and follow-up to seminars. The guidelines are frequently revised in order to take into account current events or changing conditions to ensure that they remain up to date.

Critical-emancipatory training

Critical-emancipatory training in Germany emanates from the educational theory discussion in the 1960s and 1970s. Social science during this period (spearheaded by the rediscovery of Adorno's and Horkheimer's Critical

Theory and Marxism) placed educational science in the service of enlightenment; buzzwords included emancipation, independence, liberation, self-determination and societal change. The basic assumption was: in capitalism or imperialism human beings are exposed to the overall societal logic of exploitation, suppression and alienation. This is not perceived as such by people, however, as the underlying ideology is concealed by structural obfuscation (veiling mechanisms). The relations of control and power are not perceived. As a result people affirm and reproduce existing relations of production and consumption.

Critical-emancipatory education has the task,

- of explaining, i.e. reviewing true capitalist mechanisms and helping participants assume responsibility.
- of emancipating, i.e. developing utopias, democratic attitudes and solidarity.
- Analysing and revealing the mechanisms and laws of "freedom" while bringing about a common process of understanding and compromise. The individual's own place in relations of control and power are examined in a self-critical fashion.
- Developing forms of resistance and translating these into practical actions.

Conveying skills

The notion of skills is under criticism, as it is rightly feared that humanist education will be replaced by functionalist training, i.e. the notion of education will be left with merely an economic thrust.

Trade union educational work seeks to empower colleagues to act effectively in company and societal issues, struggles and disputes. Skills create the lin-

kage between (tangible) knowledge and (technical) abilities and only develop through repeated practice and reflection over a long period of time. Even if skills thus cannot be conveyed in a short period, educational work can contribute to participants getting to know theories and techniques, gathering initial experience in exercises and receiving stimulus for everyday practice.

With regard to the expansion of social skills, an introduction to communications theory and the "dialogue principle" ensures a better understanding of the complexity and depth of communication. Through exercises it is possible to experience things which allow one to question accustomed attitudes and recognise strategies for defending interests, but also promote interaction in everyday communication based on solidarity.

Technical skills are strengthened by case studies. Experience from the field of practice which is perceived as difficult requirements, as a problem or uncertainty, are used as case examples in the seminar. Theoretical tools are applied and possible solutions tested in case-orientated discussions and games. "Future workshops" encourage participants to think outside the box, opening up new and different forms and processes of trade union action at companies and in society.

The notion of skills also not least includes political skills. Oskar Negt has summed these up in six key skills:

1. *Identity skills* – the ability to deal with vulnerable and shattered identities and also be able to analyse one's own disruptive moments in life, create an atmosphere of respect and recognition and strengthen feelings of self-worth.

2. *Ecological skills* – the ability to interact with nature around us in a caring manner, but this also applies to the internal nature of human beings.
3. *Technological skills* – the skill to conceive of technology as a societal project, assess the impact of technologies and think in terms of different paths of development.
4. *Economic skills* – the ability to escape from business-administration blinders and conceive of economics as a means of satisfying societal needs.
5. *Justice skills* – strengthening sensitivity for injustice, exclusion and wrong.
6. *Historical and utopian skills* – the ability to perceive societal relations as historically evolved and changeable and develop socio-political perspectives.

(Allespach/Meyer/Wentzel: Politische Erwachsenenbildung, Schüren 2009, S. 39)

These definitions of political skills are recognised in the trade union educational work of IG Metall and have a two-fold consequence:

- for actual analysis in seminars: the goal is to look at a substance matter from all six sides if possible.
- for the focus of the IG Metall seminar structure: specific seminars are developed and offered throughout Germany on all topics.

Module training

It has been shown that the organisation of initial and further training by voluntary trade unionists and moderators in modules has advantages over classic seminars lasting a week. First of all, modules only take place on two or three days. This makes it easier for colleagues to take part in seminars, as

it is becoming more and more difficult especially for colleagues in small and medium-scale enterprises to receive leave of absence from work to attend seminars. Module training is designed so that models build on each other in terms of content and methodology, thus from an educational perspective offering the advantage that there is a longer period of 8 to 12 weeks between the modules in which participants can practice new forms and ways of work, repeatedly contributing their experience and raising questions in the training process.

Open strategy and rigid planning

The concepts used in trade union educational work are understood to be "open". This means that they are orientated towards experience and relate to the everyday lives of colleagues. In terms of content, this means that the participants are able to and should exert influence on the contents (topics). At the same time, seminars are rigid in terms of planning. In methodological terms, they map the approach of future workshops, case analysis or the trilogy of comparing experience, analysis and orientation towards action.

Organizing

"Organising" as a combination of methods, tools and attitudes aims at establishing and strengthening trade union structures and the acquisition of new trade union members while keeping existing members at companies. Planning and executing an organising campaign is marked by an extremely systematic and plan-based mode of work which proceeds strategically. Employees are addressed in a systematic fashion and enabled to set themselves in motion and defend their interests. The IG Metall Executive Board has declared organising to be a strategic focal point in the effort to gain new

members. Projects along these lines have been initiated and have the following aims and objectives: the preservation, expansion and reestablishment of organisational power by increasing membership and a fundamental change in organisation as a precondition for successful organising.

Organising is supported by intensive, special training work. Organising offers the possibility to systematise and conceptualise aspects in training work which have been taken less systematically into account thus far, e.g. analyses of economic sectors and companies, carrying on discussions, targeted political argumentation and personal attitudes and stances. A large portion of training work consists of supporting projects and systematic project reflection by educationalist staff.

Political Education

In Germany a distinction needs to be made between school and non-school political education. School and large parts of non-school political adult education focus on institutions. Here neutrality in conveying knowledge and information is prescribed by the "Beutelsbach consensus". Trade union political education must be clearly set apart from this. Trade union educational work of IG Metall develops and strengthens the power of IG Metall at companies and in society by means of learning processes steeped in practice.

It creates space for reflection over company and trade union work processes and supports these through tailored programs and advice. This helps develop and strengthen office-holders and members' socio-political skills while expanding their technical and methodological knowledge and abilities. This understanding of education is oriented towards a critical, emancipatory relation with company and societal power and control structures. The educa-

tional process promotes an active, interest-oriented design of comprehensive co-determination processes based on solidarity at companies and in society. The objective is to achieve as much democratisation of economic and overall societal processes as possible.

Political-cultural training

In trades union educational work, political education is not intended to help people conform, nor is it reduced to the conveyance of knowledge on political institutions and the official version of history. Political-cultural education views itself as “subject-formation” oriented towards the everyday reality of the participants. It even has the nature of an interdisciplinary project itself, as it involves colleagues in planning and organising while inculcating utopian ideals.

Subject orientation

Participants do not allow themselves to be instructed, persuaded or especially manipulated from outside. They are subjects who introduce their own learning aims and objectives in seminars, and teachers are well advised to coordinate their teaching objectives with learning objectives of learners, the reason being that participants in trade union educational work are adults and have good individual reasons for their everyday actions. They do not want to be instructed, but rather learn what they think is necessary, and want to compare and review the reasons for their actions with others.

Respect

Social skills, i.e. the ability to communicate with one another, have gained importance as elements of so-called core skills over the last decade. But not

only skills of listening and speaking are needed in trade union educational work (just like in trade union practice in general); these can also be learned as techniques. What matters, rather, is more a fundamental attitude towards all human beings. In the awareness that human beings are social beings and that we need each other to live fulfilled lives, the task is to eliminate prejudice and bias, view cultural diversity as a gain and encounter one another with curiosity and empathy. Seminars in trade union training work are therefore always a utopian model of human coexistence as well.

Solidarity

Trade union solidarity is founded upon the realisation that employees dependent on wages are in a constant situation of competition in a working world organised along market economy lines – nationally and globally. If they want to overcome these in a positive manner, they have to recognise their own common interests and achieve their demands towards employers. To do this, employees dependent upon wages need to have a feeling of community based on shared moral values and a common culture. This understanding of solidarity is based on equality and is clearly delineated from a notion of solidarity which means compassion and willingness to help weaker persons or disadvantaged persons or people requiring aid. It is precisely the problem of "equals" that sums up the difficulties plaguing the international effectiveness of trade unions.

Orientation towards participants

Participants do not want to nor should they only learn what the teachers want; they have their own learning objectives, rather, which trade union educational work identifies, turns into the subject of seminars and together

with all the participants looks for solutions/possible actions. Teachers register these learning interests of participants and always view themselves as (additional) learners as well in seminars.

Utopia and training

Political education by trade unions creates a distance that helps view everyday life with detachment – including when it examines itself. It creates time and space for reflection, not only analysing action-related problems and countervailing interests in terms of current subjective and societal conditions, but also factors beyond the given state of things to discover the "in-potential-being" (Bloch) in reality. This involves spelling out a specific utopia to serve as a counter-pole to radical market obsession with costs and boosting efficiency. In view of social division, wars, poverty, economic and ecological exploitation, political education seeks to provide orientation in a diffuse future – democratically, socially and based on solidarity.

Visualising methods in seminars

Visualisation means "optical depiction". Methods of visualising mean not only (primarily) showing images, but also creating these images. Although people have five senses and thus five channels of perception, only one channel is generally used in the teaching-learning process: hearing! Colleagues can often express themselves in a more comprehensive, specific and precise manner with images. Concentration and attentiveness are enhanced through a visual language. In addition, it also strengthens powers of recall and memory.

Additional advantages offered by visualization in seminars:

- Visualising methods activate participants; they are of a project nature.
- If the task is to make the experience of participants the subject, visualising methods helps "bring reality into the seminar".
- Visualising forces persons giving presentations to distinguish between important and unimportant information.
- Visualising highlights interrelationships.
- The moderation – i.e. the visualisation of statements made by participants – works with cards and a wall newspaper. Statements made by participants, controversies and results are presented, structured and written down so they are visible to everyone.
- Things which are difficult to explain are easier to convey by means of visual support.
- Visualising makes possible coterminous perception instead of a sequence of language messages on a time line – facilitating uniform interpretation.
- Visualising methods are fun (they generate enthusiasm and motivate people).

Declaration of intent for a transnational trade union education in Europe

Trade unions and their educational facilities from eight countries have joined together in the EU project Quali2Move over the period 2011 to 2012, with trade union education taking on a European dimension. Based on the Declaration on Vocational Education and Training of the Newton Project¹, the project partners in Quali2Move have elaborated common foundations and aims for trade union political education. The undersigned call upon European trade unions and institutions funding trade union education to support and implement this educational strategy in their educational work within the framework of their possibilities and while taking into account their cultural, historical and socio-political context.

Democratisation of Europe through the promotion of participation and involvement

Trade union education is an important pillar of youth and adult education. In almost all European countries it has a strong tradition of self-organised and interest-oriented supplementation of the general educational system. Trade union education has the objective of fostering participation by employees by encouraging their involvement in their companies and societies. It is to this end that trade unions and their educational partners develop educational programmes going above and beyond those offered by the formal educational system. It aims at encouraging people's powers of critical scrutiny as well as learners' courage and self-confidence so that they can help shape company and social developments in a manner marked by solidarity.

➔ General education is an indispensable prerequisite for social and political involvement as well as participation in companies, the labour market, society, politics and educational systems.

1 www.newton-project.eu

That is why trade union educational work builds on this, fostering involvement in these areas. With their educational programmes and efforts to develop skills, trade union education seeks to fight social injustice and ensure participation and co-determination. It thus opens up opportunities for transnational democratisation processes in Europe.

Solidarity: a key principle in education

The development of educational systems in Europe is suffering from cut-backs in financial resources and constraints on access to educational programmes. Privatisation and political regulation in the field of education are at the same time producing growing inequalities in education. Competition between learners is on the rise, preventing the learning of cooperative behaviour based on the principle of solidarity as the foundation of a democracy. At the same time, competition which excludes people in the occupational and social context also poses a threat to democracy and impedes solidarity. These processes have to be stopped and radically changed if we are to bring about a democratic society. Education and civil commitment is about more than just making people employable. We view economics and social affairs to be intertwined, with participation and involvement first of all promoting the political community, and secondly fostering people's personal-cultural development on the basis of a social consciousness. Trade union education has been practicing cooperation instead of competition in education for years, thus encouraging democratic action in social areas which are expanding at the transnational level at present. This is why the current crisis in Europe underscores the important role of trade union education as an element of non-school education and lifelong learning in Europe.

- ➔ Trade union educational work is based on the principle of cooperation and promotes solidarity as a fundamental value reflected in the theory and practice of learning processes. Awareness of common economic and social interests is promoted in a practical process of common learning. This forms the foundations for action based on solidarity. In conceptual and methodological terms, trade union educational work follows a subject-orientated approach that differs from practice in the area of pure conveyance of knowledge and conceives participants to be active, socially learning subjects. Methods enable independent learning processes through common discussion and discovery processes.

Critical educational approach

Political-institutional Europe as well as multinational corporations make decisions that have a major impact on the working and living conditions of Europeans in their various countries. In order to preclude dramatic negative consequences for people such as are being experienced at present in Greece, Spain, Portugal, Ireland and Italy, for example, we need a critical public which is not limited to political struggles at the national level, but rather also opens up a transnational discussion. Hence the multifaceted crisis gripping Europe is revealing a need for employee-orientated education. A common critical awareness for political and economic development both at the national and the European levels needs to be promoted through education.

- ➔ Trade union educational work is therefore based on a critical approach. Mechanisms of rule are examined from a critical perspective while enabling participants to analyse social developments and prevailing patterns of interpretation from a critical angle and then put their conclusions into practice. Respect for different ways of thinking by the same

token provides the basis for human interaction. The critical approach to education thrives on ideas and values as expressed in the notions of solidarity, democracy, equality, social justice and fairness. Contents and methods employed in educational processes are based on these values.

Political and social development in Europe by fostering a European identity

Trade unions in Europe have to shape transnational processes of democratisation in order to develop the political and social union in addition to its fiscal and economic base. With their respective educational activities they are bringing about a change in course in the direction of a Europe based on the notion of solidarity. Quali2Move is taking a major step in this direction with its call for a common understanding of trade union educational work and the initial de-velopment of common contents, strategies and methods.

- ➔ Upon the foundations of this common understanding of education, the undersigned herewith assume the obligation of developing a European social consciousness on the part of employees and their interest representatives as well as corresponding action-related skills within the framework of their capabilities. The objective in this social process of education is to bring about a practice effective European identity among employees with respect to working and living realities – an identity which is based on an understanding and recognition of common economic, social, occupational and personal cultural interests.

The undersigned trade unions shall initiate projects fostering exchange, discussion and the further dissemination of these principles underlying trade union educational work to bring about a change in policy and a Europe based on solidarity, fairness and social justice.

Trade unions and their partners in education from Germany, Ireland, Lithuania, Austria, Poland, Rumania, Spain and Turkey along with the European trade union institutions ETUI and industriAll were involved in the project.

For additional information see:

www.bildung-international.de



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