



**IFWEA**

International Federation of  
Workers' Education Associations

# **23rd General Conference 2019**

## **EDUCATION FOR SOCIAL CHANGE: POPULAR, NOT POPULIST**

CAPE TOWN, SOUTH AFRICA

2-4 DECEMBER 2019

**REPORTS AND PLANS**







**IFWEA**

**International Federation of  
Workers' Education Associations**

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# GENERAL SECRETARY'S REPORT 2016 - 2019

I wish to extend a warm welcome to the IFWEA President; Vice Presidents; elected members of the Executive Committee; delegates of Member Organisations and valued guests to this IFWEA General Conference. By convening our quadrennial general conference here in Cape Town, we are upholding a proud tradition. This year IFWEA is 72 years old and has convened a representative conference of its affiliates, our highest decision-making body, 23 times.

IFWEA was formed in 1947 in London by nine European workers' education organisations. Two great Nordic educators were prominent in forming IFWEA, Oluf Bertolt of the Danish AOF and Gunnar Hirdman of the Swedish ABF. Once constituted, the first IFWEA secretariat was set up at the WEA's central office in London, with Harry Nutt of the United Kingdom's WEA as the first General Secretary. The founding values upon which IFWEA was constituted were human mutuality, social justice and freedom of expression, broadly set within the principles of the social democratic labour movement, but not expressed explicitly in party affiliation.

In all this time, IFWEA has remained a federation by structure. It has a current membership drawn from 27 countries in the following regions: Europe, Asia/Pacific, Africa and North and South America. The majority of IFWEA affiliates are based in the developing countries, and all our affiliates play an important and significant role of national and regional support for their partner labour organisations.

## **PURPOSE**

The 22<sup>nd</sup> General Conference in Lima Peru (2015) adopted the current constitution<sup>1</sup>, amended to comply with changes to the legislation pertaining to NGOs in South Africa. Yet through all the amendments to the IFWEA constitution to ensure compliance with legislation in the countries where the Secretariat has been hosted over seven decades, the

1. In South Africa this is called a Memorandum of Incorporation (MOI) for a company not for gain (non profit).

purpose of IFWEA as stated in its constitution has remained the same since its founding launch, that is, to promote and advance the education of the democratic labour movement; and to further free and voluntary education work according to the principles of solidarity and co-operation, justice and equality, democracy and freedom.

This purpose and continued existence of IFWEA is based not only on our historic legacy, but also on our shared appreciation of the absolute imperative of free, voluntary and informal lifelong learning, popularising the values of equality, solidarity and co-operation, for the highest attainment of democracy. Constant engagement with the affiliates over the past decade has left us convinced that this purpose is as relevant today and for the future as it has ever been.

Today, extreme-right movements and parties employ the rhetoric and direct action tactics traditionally employed by organisations advancing rights for the disadvantaged and marginalised. Yet they advocate values and goals counter to those which will bring about positive change, viz. ethnic and ideological intolerance, misogyny, and the selective rolling back of hard-won democratic freedoms. Popular commentators in the mainstream and social media support and articulate these sentiments. Often unable to substantiate their opinions, they denigrate all 'elites', including leaders of trade unions, political parties and the intelligentsia.

The latter is perhaps the most serious. For the first time since the age of enlightenment, intellectual autonomy and the generation of scientific evidence to substantiate opinion is under attack. The rise of 'fake facts' and 'fake news' is more than political propaganda, it is an attack on knowledge generation and dissemination. Scientists, historians, journalists and educators are at the receiving end of these attacks.

The imperative for those fighting for a more just and equal world order is to develop strategies to reclaim the popular spaces. There is a unique role for worker educators in crafting a popular counter-approach to extremism, which unites people instead of polarising them. IFWEA's worker education associations operate alongside the formal education system, and are oriented towards society's base, not pinnacle, thus avoiding any stigma of elitism. We provide valuable resources and expertise and establish trusted service relationships with trade unions and community member based

organisations. Our work encourages continued learning, is guided by principles of internationalism and democracy, and covers a broad range of workplace, cultural, social and economic issues.

Historically, worker education has always played a key role in the elaboration of the imagination, discourses and goals that formed the foundation of labour's democratic politics. Yet in recent times, shrinking resources have reduced education in trade unions and their fraternal labour associations to functional skills training alone. This waning significance of continuing education has had a detrimental effect on the appreciation of democratic values, which in turn has contributed to the rise of extremism and right wing populism.

## **PROGRAMME**

In response to the reduced resource base of our affiliates' ability to provide free and voluntary education for workers, their associations and communities, IFWEA has pioneered the introduction of online education to affiliates in developing countries. Over the past decade, we have been consistent in advocating the value and benefits of online facilities, such as affordability, accessibility and expanded reach. The IFWEA Secretariat has provided support, education and encouragement to demonstrate the positive impact that online courses can have for worker education and to build skills and confidence to utilise these facilities.

During the period under review, we have initiated this form of education methodology and encouraged a flexible, hybrid approach to the provision of worker education. We have designed activities aimed at changing perspectives and mitigating entrenched habits, so as to inform and inspire new ways of doing and sharing resources. We have situated these innovations firmly within the best of our traditions and values, and ensured that IFWEA continues to improve popular education methodologies while bridging the digital divide. We have continued to target trade unions and member based associations representing the poor, who are grievously disadvantaged when it comes to digital opportunities and skills development.

Affiliates participate in IFWEA activities by providing education in the form of study circles, seminars, workshops and conferences to the trade union and membership based organisations they service, practising participatory learning methodology. Because of their unique placement as trusted resource partners to trade unions and other membership based associations, education provided by IFWEA affiliates has an expansive reach and multiple outcomes, from:

- Transfer of skills related to technological and pedagogic development from the labour support organisations directly to the trade unions they service (bridging the digital divide through online education and study circle tutor training);
- Awareness raising through education which assists worker organisations to articulate and deal with challenges confronting workers in marginalised sectors and in precarious forms of work posed by 21st century developments (like labour market changes and climate change);
- Capacity building through building a stronger IFWEA network; improving partnerships and alliances with trade unions; developing women leadership in trade unions and member based organisations; advancing trade union leadership and organisational action in policy formulation, social dialogue and advocacy with key stakeholders.

A detailed treatment of the activities and outcomes of the IFWEA education programme are contained in a separate report. The programme for the past four years demonstrates that IFWEA:

- Can roll out a global programme across five regions;
- Can provide research, analysis and commentary across five regions;
- Has developed in-house education and curriculum development expertise;
- Has members with direct beneficiaries across organised labour/communities/social movement activist groups;
- Has experience in national and cross regional face-to-face and online education;
- Has a strong and committed core of active affiliates eager to participate, if resources can be found;
- Has the potential for growth, with concerted and directed programmatic education and collaboration.

## MEMBERSHIP

Organisational growth has always been a cornerstone of IFWEA's strategy. Having never had much resources as its disposal, affiliate growth cycles have generally been modest, and unfortunately in recent decades, not sustainable. From the early decades of exclusive European membership, IFWEA affiliation slowly extended into Africa and Asia with the process of decolonisation in the 1950s and 1960s; into Spain and Portugal from the 1970s; and into the United States, Latin America, Eastern Europe and the Arab-speaking regions from the 1980s. The 1990s saw a huge increase in membership, especially from the developing countries and post-soviet bloc.

By the early years of the first decade after the turn of the millennium, IFWEA had 90 affiliates. Simultaneously however, revenue began dropping sharply during the same period, mostly due to defaults in payment of affiliation fees. We had recruited the members, but could not really meet their expectations and needs by expanding our activities as there was no concomitant increase of resources. The majority of affiliates, could not, or would not, pay their affiliation fees. Having been on the IFWEA Executive Committee since 1995, at the height of the growth period of IFWEA, I have been part of many discussions about this shrinking resource base. A variety of solutions were proposed and implemented to halt this trajectory, with no success. The decline of a self-generating resource base through solidarity pledges for hosting the Secretariat and General Conferences from wealthier affiliates, and a steady decline in affiliation fees despite annual increases, was highlighted as a source of much concern in the EC meetings leading to general conferences in Albufeira, Portugal (2003) and Ahmedabad, India (2007).

By the time IFWEA was registered in South Africa in 2009, core revenue from membership fees was at an all-time low, with less than 50% of affiliates paying their affiliate fees per annum. The incoming Executive Committee in the first term of this Secretariat, decided on a strategy of "better smaller but better", which we have pursued ever since. This involved expanding the participation and contributions-in-kind of fee-paying affiliates through improving their participation in project activities, and dis-affiliating consistently defaulting members, whilst continuing to offer them a place in our global community through online resource provision and communication. Although leaving IFWEA much

smaller, this strategy improved the overall impact of the secretariat, as we designed a programme which strived to make a modest but qualitative difference to the work of every one of our affiliates, both in their own countries, as well as to their global collaboration and reach.

With the wisdom of hindsight, the membership attrition of IFWEA is no different from that suffered by most, if not all, of labour's organisations over the past three decades. To compound this, our sector of worker education has also been detrimentally affected by the outcomes based, skills development approach to adult education, which led to a drastic decline of state and donor resources for the values based, continuing adult education IFWEA affiliates provide.

As at 15 November 2019 IFWEA has 35 affiliates as follows:

Category 1:	6
Category 2:	3
Category 3:	1
Category 4:	23
Category 5:	2 (Associate membership)

During the period under review, nine organisations applied for affiliation, of which three were accepted. Those not accepted were mostly deemed to be unable to manage the annual Category 4 affiliate fee, which is the lowest of the categories. This number of new applications was balanced out by nine organisations which were dis-affiliated during the period due to defaulting on payments for more than two years. Although affiliation has more or less stabilised, and hence fees income stabilised as well, the long-term trend of fees defaulting and a resultant decline of membership over the past decade and a half may not yet be completely over. Only a reversal of the global trend of reduction of donor income to human rights, development and education organisations in general, and to labour education organisations in particular, will correct this.

After some interrogation at a secretariat and executive committee level, we have agreed that although our efforts to improve membership numbers will always prevail, we have to view organisational growth as more than merely an increase of numbers of affiliates. Greater affiliate participation in IFWEA activities; the impact of our and their education on targeted beneficiaries through these activities; and most importantly, an expansion of our global presence and reach, are significant indicators of organisational growth. Such expansion is best served through activity based growth, specifically participatory project activity with affiliates, so that active affiliates are able to prove the value of belonging to a global knowledge community to their partner trade union and member based organisations.

Essential to this is the provision of sufficient donor funding to allow for an expansion of activities for the next term, as our self-generated affiliate fees income is projected to remain relatively constrained.

However, although small, the annual IFWEA affiliation fees are a very important part of the budget. Despite reducing the number of potential affiliates by keeping annual fees as a condition of membership (we would have much more organisations applying for affiliation if we did not have this as a pre-requisite), it is important that we neither disperse with, nor increase, the affiliation fees for the next term. Fees been frozen since 2007, and currently stand at:

Category 1	\$ 4,299
Category 2	\$ 2,577
Category 3	\$ 1,290
Category 4	\$ 431
Associate Membership	\$ 100

We should not increase fees because, as explained earlier, we have to acknowledge that times are tough for worker education associations. Almost all of our affiliates are struggling under reduced and strained organisational resources.

We should not dispense with them because affiliation fees do provide a small but sustainable self-generated income, ensuring our continued organisational existence. More importantly, they are an important indicator of membership investment and commitment to IFWEA organisationally. This, amongst other structural procedures, is what keeps us a federation, with membership control and governance oversight.

The analysis and recommendations above have been thoroughly discussed and adopted at EC meetings during the period under review. IFWEA will continue to be an affiliate based membership organisation with an annual fee, but full reliance on this for significant income is not possible under the current economic conditions prevailing for our members.

The EC further decided that associate membership could be extended, at the discretion of the GS, on a short-term or permanent basis, to organisations who can prove that they are not able to meet the Category 4 payment of fees, or new affiliates who are not able to afford full affiliation. This allows strategic organisations to participate in programme activity as well as providing relief to those affiliates with constrained financial circumstances. Associate membership can also be offered to individuals, specifically those who have attended YGAP and committed themselves towards building our global knowledge community.

Membership by association means that organisations and individuals may participate in IFWEA programme activities, receiving resources to do so, if they pay a reduced \$100 association fee per annum. They form a fifth category of membership. These organisations are not able to vote at the General Conference, nor will they receive any subsidies to attend the General Conference, unless they are required, by the discretion of the General Secretary, to contribute to the programme activities attached to it.

## AFFILIATE INVOLVEMENT IN IFWEA GOVERNANCE AND PROGRAMME ACTIVITIES

Outcome	Specific indicators	2018	2019	Actual Total (2016- 2019)	Target
IFWEA programme activities involve participants from 40 affiliates over 2016-2019.	Number of affiliates	39	35		40
	Number of countries	27	27	<b>27</b>	15
	Secretarial and Executive visits to affiliates and potential affiliates.	18	15	<b>45</b>	NA
	Number of affiliates and potential affiliates involved in education activities	28	20	<b>48</b>	NA

## SHARING OF EDUCATION ACTIVITIES AND RESOURCES BY AFFILIATES

Outcome	Specific indicators	2018	2019	Total (2016- 2019)
IFWEA affiliates share education activities and resources	Exchanges between affiliates on FSSC Courses	5	2	<b>9</b>
	FSSC courses curriculum design with mentoring from Secretariat	8	4	<b>20</b>
	FSSC courses which conducted participant evaluations	4	3	<b>11</b>
	Resources shared by affiliates	18	6	<b>64</b>

## AFFILIATE PARTICIPATION IN IFWEA'S YOUTH GLOBALISATION AWARENESS PROGRAMME

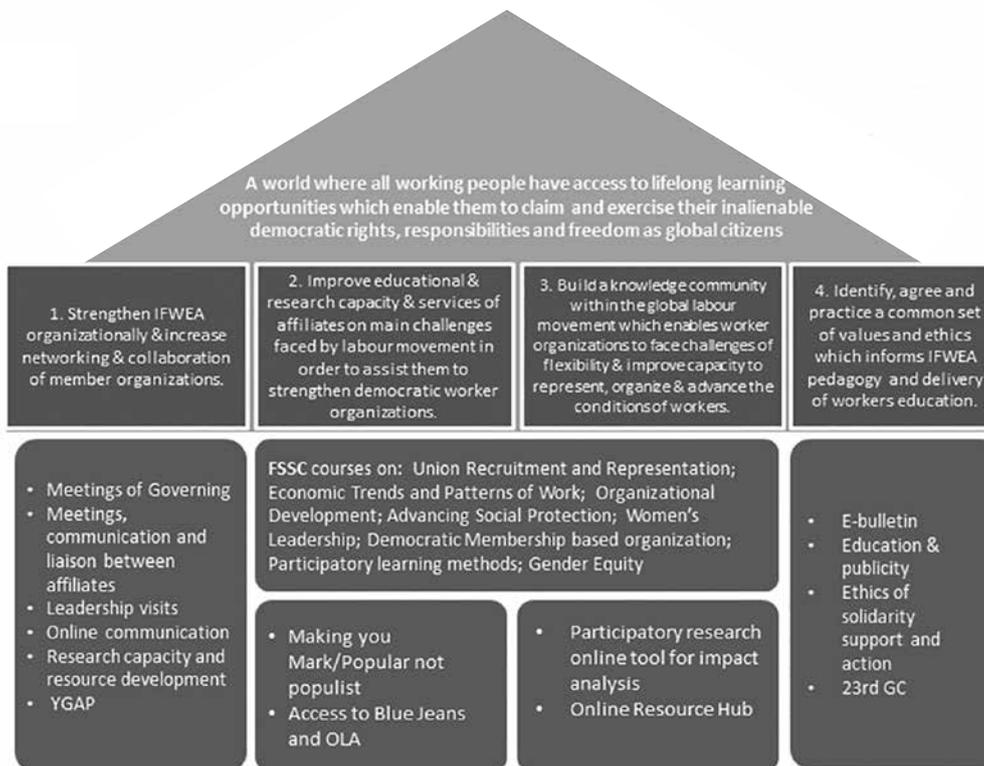
<b>Outcome</b> Improved <b>international perspectives and online and participatory educative capacity</b> of young practitioners in IFWEA affiliates and or the beneficiary organisations									
	2012	2013	2014	2015	2016	2017	2018	2019	TOTALS
Males	8	4	4	4	9	11	14	6	60 Males
Females	14	11	10	13	15	19	13	14	109 Females
Total Participants	22	15	14	17	24	30	27	20	169
<b>Total number of countries participating</b>									<b>28</b>

## AFFILIATE PARTICIPATION IN IFWEA GOVERNANCE

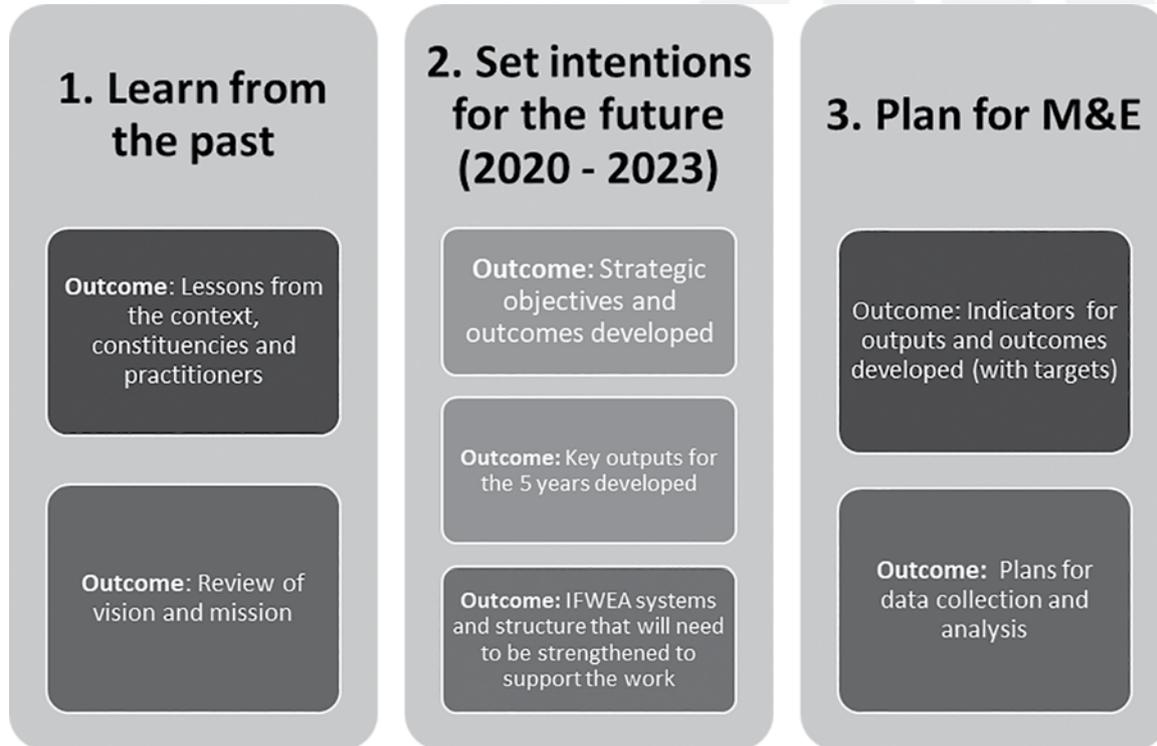
Executive Committee meetings	No of people (M)	No of people (F)	Total number of attendees	No of affiliates represented
29 – 30 May 2016	4	5	9	7
14 – 15 November 2016	3	8	11	7
6 – 7 November 2017	4	5	9	6
30 Nov – 1 December 2018	4	6	10	6
11 June 2019	3	5	8	5

## REVIEW OF STRATEGIC PLAN 2015 - 2019

In Lima in 2015, the 22nd GC adopted a four year strategic plan, summarised in the diagram below.



In reviewing this four year plan, the secretariat staff adopted the following approach:



In analysing the reach and positive changes achieved through IFWEA's work in the past four years, key factors have been identified as enabling the changes observed. Changes occurred because of:

## **THE CONTEXT**

There is increasing pressure to become competent in the digital space. This is evident in the increased use of online platforms (for banking, accessing social grants, retail employers using online training platforms, etc.). While over the past years the IFWEA Secretariat has been incrementally making a case for the shift into the online space to trade unions, the context has improved and there is increased pressure within the work and general environment to move into the digital space. This creates a supportive environment for IFWEA's work, especially moving forward.

## **THE TARGET GROUP**

IFWEA affiliates and their partner trade unions and associations share the values of participatory, popular learning and democracy. They see value in contributing to a global knowledge and education community. IFWEA thus has the potential to provide a sense of belonging and identity.

## **LEADERSHIP**

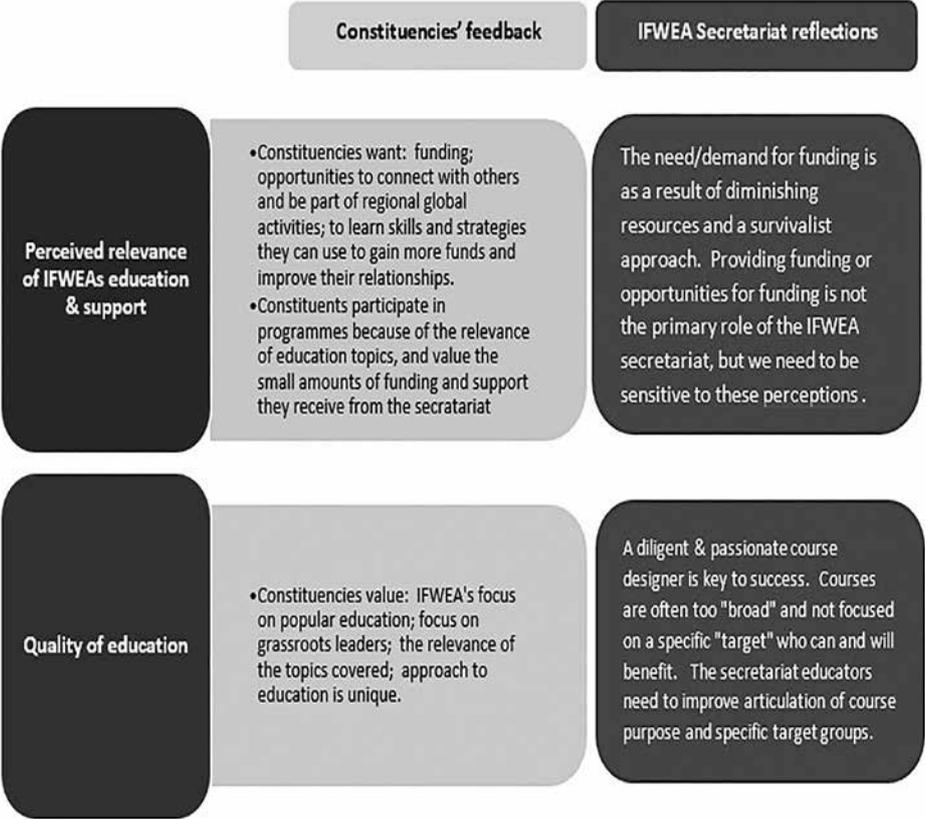
An active Executive Committee drawn from some of our strongest affiliates, and the IFWEA Youth Globalisation Awareness Programme which to date has developed 169 young educators, trade union and youth leaders from 28 different countries, form a growing pool of individuals whom the IFWEA secretariat targets for programme championing and implementation, all of whom understand and identify with the need for change and innovation. They are also willing to take risks and introduce change in their organisations.

## PROGRAMME

The IFWEA Foundation Skills for Social Change programme encourages popular and digital methods. The Secretariat further reduces the risk that comes with change through providing some financial and mentoring support and an online platform for educators to engage with each other. Successful drivers for change in the period under review have been:

- The centralised persistent support that the Secretariat provides is crucial for driving the change. This takes the form of keeping participants motivated and focussed and being responsive to questions and requests for support. It is important to acknowledge that the shift into the digital space, within the context that the IFWEA secretariat works, is one that is resisted, and so the mentoring and support required to create a positive approach to trying online education, a willingness to “try something new”, is significant.
- A programme that is based on dialogue and participation of its constituents in its design. This has created ownership and support for IFWEA's programmes and has been a key enabler of the number of grassroots beneficiaries the education activities are able to reach.

Evidence for analysis comes from affiliates and their constituencies' feedback as well as the IFWEA Secretariat reflections of our work over the past four years. The analysis is summarised in the diagram below.





### Participation in interventions

- Participation affected by: time zones across countries, time commitments/unrealistic planning by affiliates & data shortages affects participation.

Online Education is relevant but resistant is an inevitable response to innovation and the secretariat needs to explore ways to improve participation. A more generalised approach to offering courses (i.e. shoot and spray) is not as effective as a targeted approach.

### IFWEA identity

- Do affiliates and course participants view IFWEA as their global home, or their global identity?

IFWEA global identity will be strengthened if the education and support provided is useful & makes an impact. Both the IFWEA Secretariat and participating affiliates should articulate conveying who we are ; what our values are and how our education can improve livelihoods and organisation .

In the period under review, the Secretariat has succeeded in improving and increasing the level of communication and cooperation between global unions and labour education organisations in Africa. This serves us well for the next four years. We plan to concretise educator collaboration in Africa, and use the lessons learnt to improve activities and regional networking in Latin America and Asia. We will do this through developing strategic dialogue and targeted activities with regional trade union structures that support the building of a global knowledge community. We will also work to improve our contributions to the ILO's International Labour Conference, and UNESCO.

IFWEA could not function without the resource commitment of its affiliates and donors. Special mention and thanks are due to our donors the Olaf Palme Centre for providing IFWEA with a core support grant for the years 2016 – 2019, which has allowed us to build our education programme. Thanks are also due to the ABF Sweden and TSL Finland and UNI Africa, who provided essential and very welcome support and course fees for the Youth Globalisation Awareness Programme.

Support for the Secretariat comes in many forms and continuous contributions. To all the IFWEA organisations who paid their affiliation fees; put forward their leaders to participate on the Executive Committee; contributed to the Secretariat directly through solidarity fee contributions; through strategic advice and dialogue; through fundraising for participation in our programme activities; through information dissemination and the sharing of resources; through participating in the Online Labour Academy, the Foundation Skills for Social Change programme, the Study Circles for Social Change Programme and our flagship Youth Globalisation Awareness Programme (YGAP), we thank you. With your highly valued contributions as our resource, we make our Global Knowledge Community a reality.

At the recent IFWEA Executive Committee, we adopted the slogan “We have met the solution, and it is us”. Despite the enormous challenges faced by the democratic labour movement, with continuous education we build confidence, purpose, resilience, unity and solidarity to face and overcome them.

# IFWEA STRATEGIC PLAN 2020 - 2023

IFWEA retains its vision and mission into the next phase. We will aspire, together with others, to achieve the vision and mission as articulated below.

## **VISION**

A world where all working people have access to lifelong learning opportunities which enable them to claim and exercise their inalienable rights, responsibilities and freedoms as global citizens.

## **MISSION STATEMENT**

To build a global knowledge community which facilitates global cooperation between worker educators so as to advance the frontiers of knowledge education methodology and practices of democratic worker organisations promoting freedom, justice and equality for all.

## **THE CONTEXT**

In recent decades, changes to the labour market and work environment resulting from globalisation have had a profound effect on workers' livelihoods, communities and forms of work in the less developed countries. Goods produced cheaply in countries with lower labour costs can be sold practically anywhere in the world. Workers in traditional forms of employment have been dispossessed of livelihoods they had held onto for generations. Migration to urban centres has led to greater pressures on the labour force in a time when shrinking employment has accompanied these changes to forms of labour. Illegal migration to economies that are more developed or stable has spiralled.

Technological improvements and specifically internet communication frees companies to shift multiple aspects of their work to countries with lower labour and infrastructure costs. Flexible employment arrangements such as labour-only contracting and home work are now accepted employment practices. Women find themselves at a 26% disadvantage of obtaining even vulnerable work and are twice as likely to be unemployed than their male counterparts in many regions.

Trade unions, some more successfully than others, have been at the forefront of struggles to limit the effects of labour market deregulation. Although acknowledging the need to change, most traditional unions have struggled to adapt, strategically and structurally, to the new reality. After nearly three decades of labour's debate about how to respond to changes in the labour market and despite concerted attempts to influence regulatory protections on an international level through the ILO, there is still little evidence of change on the ground.

Rapid digitalisation and technological advances – now termed the 4th industrial revolution - is further affecting the structure and form of work. The so-called 'platform economy' is growing, and this will affect how working people organise themselves. There is a need for examining the efficacy of models of organisation, as well as the potential for new regulatory protections.

Geo-politically, there is a trend towards social division rather than a shared humanity. Among other reasons, this division can be attributed to scarcity of economic resources caused by, amongst other factors, the changing nature of work and work related protections. The more economically privileged focus their efforts on maintaining their privileges. This results in the working poor feeling deprived and unsupported, and causes both the privileged and disenfranchised to retreat inwards, into their own groups, as people feel the need to protect their own or their groups' interests. At times, this can include a trade-off; people give away their rights (for example to privacy or government protections) in order for those they perceive to be threatening them to be targeted. Labour parties, the traditional political allies of trade unions, have struggled to adapt to changing realities, in many cases losing sections of their traditional base. Migrant workers in informal and vulnerable forms of work and settlements have borne the brunt of these hostilities.

## OUR FOCUS

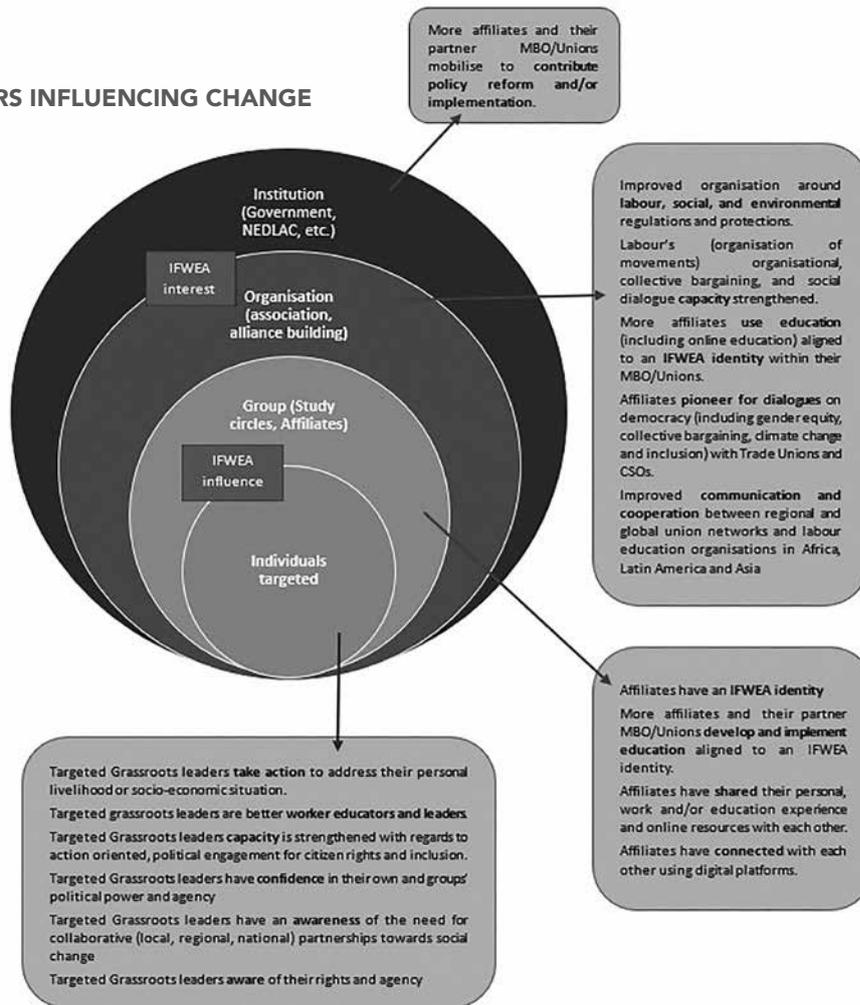
Providing educational and methodological support for trade unions, new formations and associations such as community based organisations and member based organisations who are working to improve livelihoods, socio-economic and political protections for vulnerable workers. We seek to contribute and build a concerted and successful response to the challenges they face, by unlocking our collective resources, and developing clarity on progressive responses to the current realities. This requires developing strategic partnerships between labour education NGOs, TUs and MBOs.

## OUR THEORY OF CHANGE

IFWEA's area of influence is at the individual and group level, as changes at these levels are fundamental for sustainable shifts to occur at any other levels of the system. Our education interventions target individuals located within affiliates and their strategic partner organisations, with the intention of shifting:

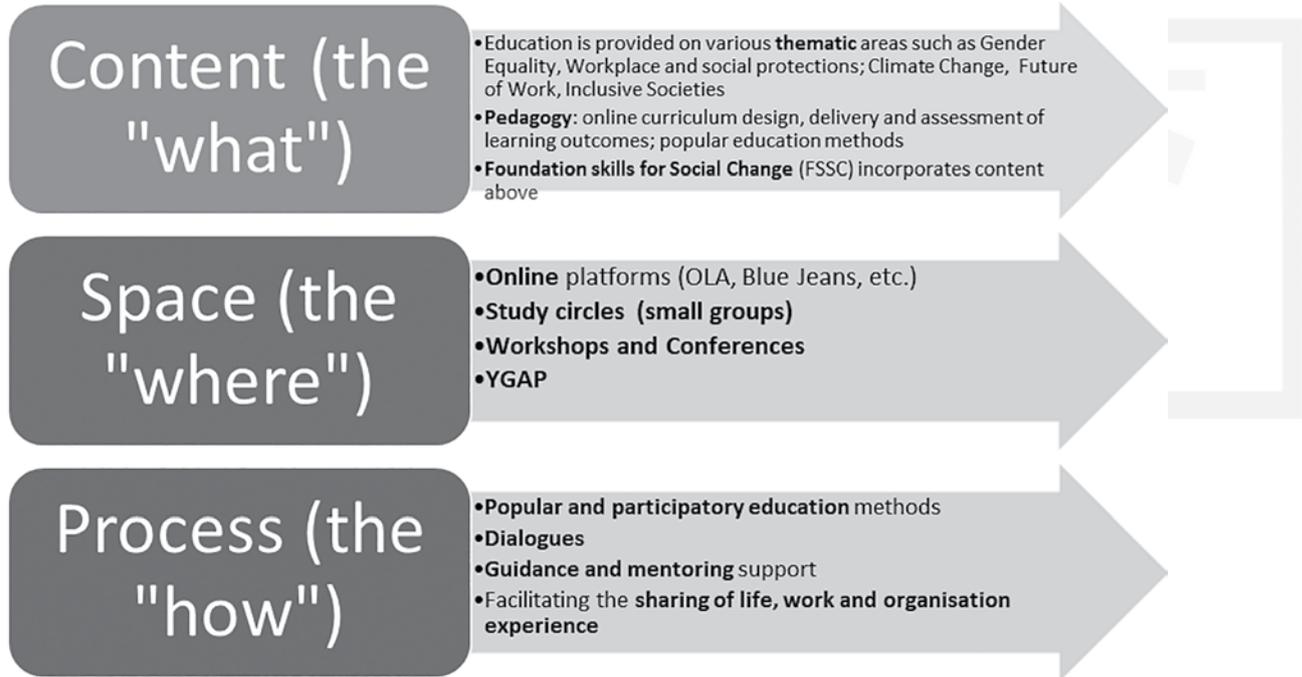
- **Consciousness:** as an education organisation it is crucial to measure changes in awareness, capacity and confidence as the first steps in the change process;
- **education practice:** improvement and optimum utilisation of digital and online facilities;
- **action taken:** at multiple levels, firstly the individual level; then at the associational in relation to how affiliates relate and interact with each other, and also on higher levels in relation to organising and advocacy;
- and ultimately, their contribution to policy reform and implementation.

## CONTEXTUAL FACTORS INFLUENCING CHANGE



## OUR THEORY OF ACTION

IFWEA works with affiliates (comprised of worker education associations, NGOs and member based organisations). These actors then seek to educate and influence leaders within trade unions and member based worker organisations. Thus, IFWEA's role is to support the change maker or "actor". The approach taken by IFWEA to bring about the envisaged changes is summarised in the diagram below.



## OUR APPROACH

Online education reduces the power dynamics between different groups as it protects the identity and perceived status of individuals. With skilled facilitation, the distance that comes with online platforms promotes improved participation. Online platforms also open up opportunities to mobilise globally, in a cost-efficient way. Although it can be argued that online education does not build group identity, the form and process used by IFWEA helps create a space of shared values, interests, ownership and experience, and this helps build connections and commonality between people and networks.

The use of **small groups (study circles)** allows for learning and sharing within an intimate space, and helps to build a group identity. **Workshops and conferences** allow for peer groups of educators and organisers to develop, review and share strategies and resources.

The key assumptions underlying this approach is that there is an **identified need or perceived gap** in the education of constituencies and thus a willingness, on their part, to engage in the education offerings. This is mitigated by the trusted relationships built over years, between IFWEA affiliates and their partner/member organisations.

## STRATEGIC OBJECTIVES

OBJECTIVE ONE: Advancing trade union policies on protections, regulations and livelihoods in informal and vulnerable forms of work.

OBJECTIVE TWO: Developing methodologies and tools for workers' education and social communication in the globalised era of digitalisation.

## **HOW WILL WE REACH THESE OBJECTIVES?**

IFWEA affiliates will pioneer education, dialogue and collaboration on effective organising, collective bargaining and representation of vulnerable workers in informal forms of work.

IFWEA affiliates will contribute to developing young leaders in worker organisations who have an awareness of the need for collaborative (local, regional, national and global) partnerships and alliances to effect social change.

IFWEA affiliates will target women leaders in unions to empower their awareness, confidence and agency in building inclusive trade unions.

IFWEA will facilitate communication and co-operation between regional and global trade union and NGO networks and partnerships with labour education organisations in Africa south of the Sahara, MENA, Latin America and Asia.

IFWEA affiliates will target grassroots worker leaders and strengthen their capacity towards action-oriented, political engagement for citizen rights and inclusion.

IFWEA affiliates will collaborate to strengthen IFWEA organisationally, build and share resources.

## **WHAT WILL OUR ACTIVITIES BE?**

IFWEA will develop education opportunities for national, regional and grassroots union leaders, negotiators and educators, to share their experiences in developing alternative solutions and strategies for organising, alliance building, collective bargaining and social dialogue. Through our education, we will craft a common consciousness that overcomes divisions, builds solidarity and is inclusive of vulnerable workers in the economy.

IFWEA will support the building of a global knowledge network of educators and activists in the labour movement to develop popular education for raising awareness and involving leaders and grassroots members of trade unions in campaigns for stronger political protections including programmes and legislation to counter workplace violence against migrant workers and informal traders.

IFWEA will expand its Youth Globalisation Awareness Programme (YGAP) which promotes youth leadership in our affiliates and their partner organisations of labour. YGAP develops participants' understanding of the essential skills required to build global solidarity based on shared progressive values. Themes for discussion will include economic justice and social protection for vulnerable sectors of the working population; the effects of climate change on the poor; effective popular methods for countering work related violence and political extremism.

IFWEA will develop online resources and popular education that builds and supports women friendly trade unions and develops women's leadership, through a global network of gender educators and activists working towards women becoming initiators of development in their organisations and communities in which they live, and for women to rise up in the ranks of their organisations. Online learning is more conducive to women learners, as it allows for flexible time arrangements and less travel, and can facilitate the sharing of strategies for dialogue, coalition and alliance building.

IFWEA will develop online workers' education curricula, materials and methodologies. IFWEA has made strides in training educators from selected affiliates to use our online education and communication platforms to design and conduct education approaches for grassroots leaders in their contexts. The next phase is to develop a network of online trade union and membership based NGO educators who become self-reliant for their further learning and can cooperate to make online workers' education more accessible and relevant and mindful of their constituency's needs, challenges and potential.

## **METHODS AND ETHOS**

IFWEA will promote a range of online and face to face popular education methods that can be used to raise the voices of precarious workers and to counter the growing support of and adherence to populist and authoritarian tendencies within the labour movement. Through utilising grassroots authenticity and popular appeal, it is possible to achieve respect and understanding for the needs of the most vulnerable sectors of society. Collaborative effort provides motivation and builds capacity of trade unions, NGOs and social organisations to work together, laying the foundation towards dialogue and strategic alliances.

IFWEA will maintain transparent, open and participative governance and improve communication and cooperation with labour education organisations (both existing and potential affiliates) in Africa, MENA, Latin America, Europe and Asia.

IFWEA will replenish its Executive Committee members and increase the allocation of resources for recruitment, networking and collaboration in Africa, MENA, Latin America, Europe and Asia.

IFWEA will ensure that all our programmes and activities are conducted in a manner that is cognisant of gender power relations and will also be evaluated on this basis so as to continuously improve our ability to be inclusive and raise the profile of women and instil gender equity within organisations that make up the broader workers' movement.

All education activities of IFWEA will explicitly promote our values of equality and justice, and the need for dialogue and inclusive participation, which mitigates against violence and promotes non-violent methods to resolve socio, economic and political differences and divisions.

Corruption is counter to our objectives and is a big risk when working with grassroots activists due to ignorance of transparent and accountable methods as well as because of the desperate conditions faced by members of the organisations. For this reason the Executive Committee and Secretariat have in place procedures for accountability that are transparent and easy to monitor ensuring that there is no room for corruption.

IFWEA operates like a global network, but has membership control, as it is a federation. The structured relationship between the IFWEA Executive Committee, Secretariat and affiliates allows for the successful delivery of activities, and facilitates communication and co-operation. All IFWEA affiliates share a common aim to promote and advance education within a democratic labour movement. This facilitates the strengthening of relationships between the participating IFWEA organisations and one step downstream, the development of further relationships, trust and alliance between the IFWEA affiliates and their trade union target groups.

**Submitted to the 23<sup>rd</sup> General Conference by Sahra Ryklief  
IFWEA General Secretary  
December 2019**

# IFWEA EDUCATION PROGRAMME REPORT 2016 – 2019

## INTRODUCTION

The IFWEA education programme is driven by the priorities, projects and people in our affiliates and partner organisations. The achievements are therefore a result of their efforts and drive for social change based on solidarity, unity and life-long learning where nobody is left behind. “Workers’ education, understood to mean the education of workers by workers for purposes they themselves determine, has always been a highly contested terrain, just like work itself.” (Merrill and Schurman, ILWCH, 2016) IFWEA affiliates and its partner organisations are at the forefront of this contestation experimenting with new methods, materials and concepts to understand and provide education about how the world has changed and especially about the world of work where change is now continuous.

This report does not give a detailed account of each activity conducted (this can be found in the annual reports). It provides an overview of the core education programmes developed and run in the period 2016-2019. It highlights the achievements and the potential for future development of these programmes. Fortunately a beginning for all these programmes started before this period and after the consultation in the 2015 Lima General Conference we were able to make changes, improve the focus and solicit greater participation based on the strategic objectives outlined in the Secretary General’s report. Although in many instances we exceeded the targets we set, we are also highly conscious of the need to secure even greater participation and lay the ground for sustainability which, in our times, will not come easily or quickly

## OUR PROGRAMMES

After the 22<sup>nd</sup> General Conference in 2015 held in Lima, we structured four separate but interrelated education programmes, each addressing specific challenges but jointly addressing our attempt to build a global knowledge community of grassroots labour educators and researchers. Below is a table that outlines indicators for each of these programmes and how we fared.

<b>Key Indicators of the IFWEA Education Programme 2016 - 2019</b>		
	<b>TARGET</b>	<b>ACTUAL</b>
<b>Foundation Skills for Social Change Certificate Programme</b>		
Number of courses in the FSSC programme	8	8
Number of affiliates involved in the FSSC programme	8	6
Number of course participants in the FSSC programme	100	151
Number of organisations that participated in FSSC courses	50	55
<b>Study Circles For Social Change Programme</b>		
Number of Study Circles facilitators trained	100	210
Number of Study Circles conducted	40	60
Number of participants in Study Circles	200	405
Number of affiliates involved in the Study Circles programme	8	10

<b>Key Indicators of the IFWEA Education Programme 2016 - 2019</b>		
	<b>TARGET</b>	<b>ACTUAL</b>
<b>Youth Globalisation Awareness Programme</b>		
Number of participants in YGAP	150	101
Number of affiliates participating in YGAP	12	15
Number of countries that participants came from	16	25
<b>Online Labour Academy</b>		
Number of participants that enrolled in online courses	200	255
Number of participants that completed online activities	150	200
Number of affiliates that participated in designing online courses	10	9
Number of educators trained to design and facilitate online courses	40	70
Number of countries that participants of online courses came from	20	35

### **FOUNDATION SKILLS FOR SOCIAL CHANGE CERTIFICATE PROGRAMME (FSSC)**



The purpose of this programme is to develop accessible popular education courses that improve skills, knowledge and understanding required by grassroots leaders to organise and represent their constituencies and participate more fully in the development of their organisations. Grassroots leaders' access to and participation in education has declined tremendously given political shifts within the labour movement as well as the costs to maintain grassroots education. The high turnover of grassroots

leaders due to the precarious nature of work where shop stewards change jobs often or are losing jobs is a challenge faced by many organisations that have to keep on training new leaders with resources they do not have. The Foundation Skills for Social Change Certificate Programme enables organisations to provide a range of courses at a grassroots level using participatory and popular methods at greatly reduced cost for organisations. The following courses were developed:

- Activist Economics (Rutgers)
- Education For Empowerment: The social aspects of learning to promote citizenship (Limerick)
- Creating A Gender Equal Workplace: Working women take up the challenge (LRS and LEF)
- Participatory Learning Methods: An introduction to workers' education (Secretariat)
- Women's Leadership (IASEW)
- Lights Camera, Social Action (SayME)
- Popcorn and Politics (Community Photographer)
- Theatre for Change (Patsime)

These courses, designed by educators from seven affiliates, involved over 150 participants and 55 trade union and community based organisations in the pilot run. The courses are freely available on the IFWEA Online Labour Academy and can be used by organisations in their education activities. The method of designing these courses was through selecting educators that have experience on the topics and providing them with some funding and technical support to design and pilot the course with grassroots leaders. This programme has allowed us to use the knowledge of our affiliates and build stronger relationships with them and between them. For example IASEW was able to run the Women's Leadership course with study circles hosted by ISD in Sri Lanka, CLASS NEPAL and IDEA in Cambodia. Another example is the Gender Equity course which was jointly designed by LRS (South Africa) and LEF (Pakistan) bringing grassroots leaders in both countries into one course and using webinars for participants to share their experiences.

We met our target of having eight Foundation Skills For Social Change Certificate Courses by 2019 but we achieved much more. We are already in the process of designing courses to strengthen trade union environmental activist networks with ITUC Africa, to strengthen global trade union company networks with UNI Africa, and to strengthen networks for lobbying for the ratification of ILO Convention C189 and Convention 190 with ZCIEA, IDWF and StreetNet. There will also be courses on Information and Communication for Collective Bargaining, Negotiation Skills, and Organisation Management and Administration Skills. Popular education courses to assist members of organisations to form dance groups, music groups, visual arts groups and story-telling workshops are also in the pipeline. The more organisations that get involved the more this programme will grow, enabling education at the grassroots to become increasingly accessible and vibrant.

Our appeal to you is use and promote these courses and contact us if you need any assistance. We also look forward to all affiliates offering courses for this programme and to run them locally or within their broader networks.

### **THE STUDY CIRCLES FOR SOCIAL CHANGE PROGRAMME**



The purpose of this programme is to encourage membership participation and involvement in organisational activities through self and collective learning by training facilitators in participatory and interactive study circle methods. Sustaining an active membership is a big challenge for most organisations in the labour movement where membership is in decline and members are confronted with working conditions that are deeply alienating. Involving grassroots leaders in solidarity education builds confidence and vision, improves the skills of and relationships between grassroots leaders and develops members' commitment to and activism through their organisations.

A course was designed on the IFWEA Online Labour Academy to train facilitators - Study Circles: A Facilitators' Guide – and 210 study circles facilitators were trained in 10 affiliates. Study circles were conducted by Class (Nepal), CENAC (Bolivia), INAESIN (Venezuela), ZCIEA (Zimbabwe), Patsime (Zimbabwe), HKCTU (Hong Kong), FSPMI (Indonesia), ISD (Sri Lanka), and IDEA (Cambodia). The IFWEA Secretariat also hosted 20 local study circles in Cape Town with community organisations and trade unions. A project to encourage youth voices on politics and participation of youth in politics, "Making Your Mark", with the University of Limerick, provided the space to develop popular education for youth study circles and supported a youth exchange programme between Limerick youth and youth involved in Cape Town study circles.

We achieved over double our set target of training 100 study circles facilitators between 2016-19 and we supported over 60 study circles involving over 400 participants (of whom over 65% were women) in developing organisational skills, internet and online skills, learning about popular forms of education and creating awareness about gender equity and gender based violence. There were also study circles that focussed on community gardening and environmental sustainability.

Sharing of grassroots knowledge was very difficult as internet skills and access to the internet remains a huge challenge in many parts of the world. Much of the sharing of knowledge was through affiliate reports to the secretariat rather than direct sharing between study circle participants. In the coming period there will be a focus on developing online skills and experimenting with online study circle methodologies and supporting the direct sharing of ideas and practical lessons for generating grassroots activism.

Going forward we want to encourage all affiliates that have study circle programmes or programmes that support self-learning through local popular education projects to work together so that the IFWEA global knowledge community is grounded in local experiences and struggles. Gathering this experience and working with affiliates will improve our ability to work with global unions like StreetNet and IDWF whose workers toil under informal conditions but also with global unions like ITF, UNI, INDUSTRIALL and BWI where workers are faced with ever declining social protections in ever increasing precarious forms of employment.

## YOUTH GLOBALISATION AWARENESS PROGRAMME



This purpose of this programme is to develop the next generation of worker educators who can collaborate and provide the global labour movement with the education required to tackle the challenges of the 21st century. This is a two week course with a participatory and interactive curriculum to create a life changing experience for youth participants that reinforces values of global solidarity. Exposure to different perspectives, experiences and methodologies assists participants to understand, adapt to, work with and build peer groups based on different cultural, political and geographic histories. YGAP enables young leaders to become confident in engaging on global issues based on shared values of solidarity.

This programme evolved from what was initially a Nordic school from 2012-2015 to a global programme involving affiliates from Africa, Latin America and Asia from 2016. We are below our original target of involving 150 youth participants between 2016-19 because the coordinating team reduced intake to between 25-28 participants a year, as the educational quality drops when we have more. We were able to involve 101 participants between 2016-19 coming from 15 affiliates in 22 countries: ABF (Sweden), TSL (Finland), HKCTU (Hong Kong), ENS (Colombia), LEARN (Philippines), CLASS (Nepal), LEF (Pakistan), LRS (South Africa), PLADES (Peru), CENAC (Bolivia), INAESIN (Venezuela), FSPMI (Indonesia), Patsime (Zimbabwe), ZCIEA (Zimbabwe), and Empire State University (USA). UNI AFRICA also participated from 2017 by sending participants from affiliates in Cameroon, Botswana, Uganda, South Africa, Ghana, Zimbabwe and Zambia.

The formalisation of the YGAP coordinating committee improved coordination and enabled improvement of the curriculum, education methods and reach of the YGAP programme. We will use this experience to expand youth education with affiliates at a regional level as well as with global unions, taking up the challenge of creating the next generation of global labour leaders grounded in global solidarity values and practices. Affiliates will play a critical role in the next period as the growth of youth education will require their expertise and experience in different regions.

## IFWEA ONLINE LABOUR ACADEMY



The purpose of this programme is to develop online workers' education that is accessible, relevant and useful for membership-based organisations through training worker educators in our affiliates and in trade unions to design and facilitate online courses.

The need to develop new methodologies, materials and curricula in tune with the times is a challenge faced by all affiliates. One of the most significant changes alongside the digitisation of the nature of work is the growth of online education and huge improvements have been made to online Learning Management Systems (LMS) that makes education easily accessible, flexible and cost effective. The IFWEA Online Labour Academy was initially designed by our affiliate PLADES (Peru) in 2012 using the open source Moodle platform, because it is a free, all-in-one, customisable, secure system that can be used on any smart device. Although the labour movement lags far behind in online education, workers are increasingly going online for information, communication and education. Many affiliates realise that improving our use of online education opens up new opportunities to reach a wider constituency and also to access funds for ITC training and services within the labour movement.

The uneven experience and use of the internet poses a tremendous challenge for cooperation between IFWEA affiliates and other labour organisations. Between 2016-19 IFWEA trained 70 educators to use the Online Labour Academy to design and run courses. These educators come from 12 affiliates: HKCTU (Hong Kong), IASEW (India), FSPMI (Indonesia), PLADES (Peru) ISD (Sri Lanka), IDEA (Cambodia), LEARN (Philippines), CLASS (Nepal), LEF (Pakistan), LRS (South Africa), ZCIEA (Zimbabwe), and Patsime (Zimbabwe). A number of affiliates are now developing courses in home languages – ISD (Sri Lanka) in Tamil, IASEW (India) in Gujarati, and IDEA (Cambodia) in Kmer involving over 50 participants during 2019. PLADES developed and ran courses for informal workers in 2018 and mine workers in 2019 in Spanish. We also supported the following global unions to design online courses in 2019: UNI Africa, IDWF, StreetNet and ITUC Africa which will be piloted in 2020. Olof Palmer Centre supported the training of a few of their other partners in 2018: LARRI (Namibia), TOCOSWA and IRALE (Swaziland) and ZCTU (Zimbabwe). We also showcased

the IFWEA Online Labour Academy to 10 unions, affiliated to the Zambian Congress of Trade Unions, hosted by the Zambian Institute for Labour and Research Development in 2019.

To enable all affiliates to provide online education we developed the following courses that are freely available and users can complete these courses at their own pace:

- How to Create an Online Course
- How to Facilitate an Online Course
- How to use OLA as a student
- How to use OLA as a guest
- How to Create a Gmail (email) Account

To enable cooperation between affiliates and improve the sharing of materials and content in different languages, a Google translate button has been added to the platform for quick translation. There are a number of other user-friendly and interactive features like the virtual classroom that we will explore and teach facilitators to use as we build our global knowledge community in the next period.

We set a target of training 40 educators from 10 affiliates to design online courses that involve 200 participants. While only nine affiliates designed online courses, 70 educators were trained to design online courses and 255 people enrolled in courses with 200 of them completing online activities like uploading assignments, participating in forums and chats or logging onto webinars. We do have a long way to go and there is a need for affiliates to be more proactive in approaching the Secretariat to support their online education development. This is something that we hope delegates of the 23<sup>rd</sup> General Conference will take home with them.

## **CONCLUSION**

We have learnt to work together in this era of precarity as well as scarcity of resources and we continue to build on the history of workers' education which, as stated by Michael Merrill and Sue Schurman, is "a history of workers striving to remake their communities into democracies and themselves into democrats". The rise of right wing and authoritarian populism has thrown down the gauntlet for worker educators. Are we still able to educate in a manner that wins support for democracy, justice and peace? Rather than shying away from this or casting blame, it is an opportunity to be more focussed in our future together to prove that workers' education will rise to the challenge – together, we are the solution.

**Submitted to the 23rd General Conference by Saliem Patel  
IFWEA Education Programme Manager  
December 2019**



# IFWEA 2016-2019 Financial Report to 23rd General Conference

## **INTERNATIONAL FEDERATION OF WORKERS EDUCATION ASSOCIATION NPC (IFWEA)**

### **Finance report for the 23<sup>rd</sup> General Conference**

**2 – 4 December 2019**

#### **1. Results for the four years ending 31 December 2019 (Appendix A)**

The results are presented in summary form extracted from IFWEA's independently audited annual financial statements for each of the years, except 2019, which is based on actual results to 31 October 2019 and forecast results for the year to 31 December 2019.

All of IFWEA's annual financial statements received unqualified audit reports for the years under review and are available for inspection on request.

The reports are based on local currency of South African Rand (R) and translated into US dollars at year end exchange rates for indicative purposes.

**a. Income Statement Summary (Appendix A page 1 of 2)**

- i. IFWEA is fortunate to have had a stable income environment over the four years based on three key elements, namely:
  - Affiliation membership.
  - Income generation programmes including Youth Globalisation Awareness Programme (YGAP) and other consultative income generation programmes.
  - Partnership with Olof Palme International Center supporting IFWEA's core activities.
- ii. Income has been relatively stable in nominal value terms, ranging between the high of R4.9m (four million nine hundred thousand rand) and the low of R4.3m in 2017.
- iii. South African inflation places pressure on maintaining consistent levels of income in real terms, in that whilst income may be stable in nominal terms, costs are increasing at rates of inflation, which has a negative impact of maintaining small surpluses.
- iv. Part of the surpluses, namely R200 000 per annum, were put aside to assist funding the costs of the 2019 general conference. This practice has been successful as is witnessed by everyone's presence at this conference.



**b. Balance Sheet Summary** (Appendix A page 2 of 2)

- i. The impact of fluctuating exchange rates is clear when reviewing the balance sheet Sustainability reserve between 2017 and 2018, in that: Despite a small Rand increase (surplus) experienced, the exchange rate alone decreased the US\$ value of the same Sustainability reserve between the two years.
- ii. IFWEA's small surpluses have ensured a solvent financial position and facilitate uninterrupted planning and implementation of programmes. This Sustainability reserve is anticipated to be to \$177 264 as 31 December 2019.
- iii. With very few liabilities, IFWEA's reserves are almost entirely matched by assets, which comprise mostly of cash but also some affiliate arrears.

## **Summary**

IFWEA's financial performance over the past four years has been sound and stable ensuring programmes are managed without the added difficulty of financial uncertainty and volatility, thus enabling an environment of continuity and delivery.

Compiled by Michael Hands  
External Financial Accountant

**IFWEA INCOME STATEMENT Summary**Appendix A  
page 1 of 2**for the four years ending 31 December 2019**

	<i>Actual</i> <b>2016</b> R	<i>Actual</i> <b>2017</b> R	<i>Actual</i> <b>2018</b> R	<i>Forecast</i> <b>2019</b> R	<i>Actual</i> <b>2016</b> £	<i>Actual</i> <b>2017</b> £	<i>Actual</i> <b>2018</b> £	<i>Forecast</i> <b>2019</b> £
<b>INCOME</b>								
Affiliation Fees	842,871	743,660	835,728	812,689	61,344	60,021	58,077	55,247
Bad debts	(145,089)	(71,486)	(184,610)	(83,472)	(10,560)	(5,770)	(12,829)	(5,675)
Grants / Projects	4,066,208	3,468,496	3,618,067	3,686,106	295,939	279,943	251,429	250,585
YGAP and other	670,024	347,300	592,555	476,906	48,764	28,031	41,178	32,421
OPC - core funding	3,396,184	3,121,196	3,025,512	3,081,580	247,175	251,913	210,251	209,489
General conference fee income	-	-	-	127,620	-	-	-	8,676
Interest income	145,375	154,834	126,946	147,024	10,580	12,497	8,822	9,995
	<b>4,909,365</b>	<b>4,295,504</b>	<b>4,396,131</b>	<b>4,562,347</b>	<b>357,305</b>	<b>346,691</b>	<b>305,499</b>	<b>310,153</b>
<b>EXPENDITURE</b>								
Programme costs	2,067,497	1,708,705	1,655,735	1,483,768	150,473	137,910	115,062	100,868
Secretariat **	2,034,868	2,225,997	2,462,813	2,938,339	148,098	179,661	171,148	199,751
General conference	-	-	-	750,000	-	-	-	50,986
	<b>4,102,365</b>	<b>3,934,702</b>	<b>4,118,548</b>	<b>5,172,107</b>	<b>298,571</b>	<b>317,571</b>	<b>286,209</b>	<b>351,605</b>
<b>NET SURPLUS/(DEFICIT) for the year</b>	<b>807,000</b>	<b>360,802</b>	<b>277,583</b>	<b>(609,760)</b>	<b>58,734</b>	<b>29,120</b>	<b>19,290</b>	<b>(41,452)</b>
Allocated to sustainability reserve	607,000	160,802	77,583	(9,760)	44,178	12,978	5,391	(663)
Allocated to (withdrawn from) general conference reserve	200,000	200,000	200,000	(600,000)	14,556	16,142	13,899	(40,789)
Year end exchange rates					13.74	12.39	14.39	14.71

\*\* = the Education Assistants cost was moved from Programme costs to Secretariat in 2019

**IFWEA - BALANCE SHEET Summary**

Appendix A  
page 2 of 2

**Four years at 31 Dec 2016 - 2019**

	Actual <b>2016</b> R	Actual <b>2017</b> R	Actual <b>2018</b> R	Forecast <b>2019</b> R	Actual <b>2016</b> £	Actual <b>2017</b> £	Actual <b>2018</b> £	Forecast <b>2019</b> £
<b>ASSETS</b>								
Non-current assets	14,119	44,780	42,941	42,941	1,028	3,614	2,984	2,919
Cash	2,198,135	2,705,690	2,983,105	2,373,345	159,981	218,377	207,304	161,342
Other current assets	456,114	400,989	213,799	213,799	33,196	32,364	14,857	14,534
	<b>2,668,368</b>	<b>3,151,459</b>	<b>3,239,845</b>	<b>2,630,085</b>	<b>194,204</b>	<b>254,355</b>	<b>225,146</b>	<b>178,796</b>
<b>EQUITY &amp; LIABILITIES</b>								
Equity	2,578,932	2,939,734	3,217,317	2,607,557	187,695	237,267	223,580	177,264
Sustainability reserve	2,378,932	2,539,734	2,617,317	2,607,557	173,139	204,983	181,884	177,264
General conference reserve	200,000	400,000	600,000	-	14,556	32,284	41,696	-
Current liabilities	89,436	211,725	22,528	22,528	6,509	17,088	1,566	1,531
	<b>2,668,368</b>	<b>3,151,459</b>	<b>3,239,845</b>	<b>2,630,085</b>	<b>194,204</b>	<b>254,355</b>	<b>225,146</b>	<b>178,796</b>
Year end exchange rates					13.74	12.39	14.39	14.71

# IFWEA 2020-2023 Budget Forecast to 23rd General Conference

## **INTERNATIONAL FEDERATION OF WORKERS EDUCATION ASSOCIATION NPC (IFWEA)**

### **Finance report for the 23<sup>rd</sup> General Conference**

**2 – 4 December 2019**

#### **2. Summary forecast for the four years ending 31 December 2019 (Appendix B)**

The forecast is presented in a similar form to that of the actual results for the past four years and reflect the broad financial framework until the next general conference in 2023.

In addition to the assumptions listed at the bottom of each page, the following are the highlights of the broad trends:



**a. Income Statement forecast (Appendix B page 1 of 2)**

- i. IFWEA has submitted a new five year proposal to Olof Palme International Center (OPC) to continue supporting IFWEA's core activities. The proposal aims to literally double efforts of programme activities for the next four years, with funding in the of US\$410 667 per annum and direct programme activity expenditure in excess of US\$250 000
- ii. In addition to OPC funding, IFWEA is targeting a new funding partnership to strengthen financial sustainability through diversification.
- iii. The four year forecast anticipates a similar sound financial management practice of retaining small surpluses to add to the sustainability fund in addition to providing for the general conference costs anticipated for 2023.

**b. Balance Sheet Summary (Appendix B page 2 of 2)**

- i. IFWEA's balance sheet is forecast to maintain a sound state of solvency over the next four year cycle.

## **Summary**

IFWEA's financial forecast anticipates a model of stability which is aimed to weather volatility and disruption in order to continue providing excellent education services to its affiliates.

Compiled by Michael Hands  
External Financial Accountant

**IFWEA INCOME STATEMENT Summary forecast**

Appendix B

1 of 2

**for the four years ending 31 December 2023**

	<b>Notes</b>	<b>Forecast 2020</b>	<b>Forecast 2021</b>	<b>Forecast 2022</b>	<b>Forecast 2023</b>	<b>Forecast 2020</b>	<b>Forecast 2021</b>	<b>Forecast 2022</b>	<b>Forecast 2023</b>
		<b>R</b>	<b>R</b>	<b>R</b>	<b>R</b>	<b>£</b>	<b>£</b>	<b>£</b>	<b>£</b>
<b>INCOME</b>									
Affiliation Fees		895,423	925,270	955,118	984,965	59,695	59,695	59,695	59,695
Bad debts		(85,118)	(87,955)	(90,792)	(93,629)	(5,675)	(5,675)	(5,675)	(5,675)
Grants / Projects	1	6,773,022	6,998,789	7,224,557	7,658,224	451,535	451,535	451,535	464,135
YGAP and other		305,022	315,189	325,357	335,524	20,335	20,335	20,335	20,335
OPC - core funding		6,160,000	6,365,333	6,570,667	6,776,000	410,667	410,667	410,667	410,667
Target - project grant	2	308,000	318,267	328,533	338,800	20,533	20,533	20,533	20,533
General conference fee income		-	-	-	207,900	-	-	-	12,600
Interest income		75,000	60,000	50,000	50,000	5,000	3,871	3,125	3,030
		<u>7,658,327</u>	<u>7,896,105</u>	<u>8,138,882</u>	<u>8,599,560</u>	<u>510,555</u>	<u>509,426</u>	<u>508,680</u>	<u>521,185</u>
<b>EXPENDITURE</b>									
Programme costs	1	4,083,550	4,047,617	4,063,299	3,927,365	272,237	261,137	253,956	238,022
Secretariat	3 - 6	3,271,474	3,467,763	3,675,829	3,896,378	218,098	223,727	229,739	236,144
General conference	7	-	-	-	841,264	-	-	-	50,986
		<u>7,355,024</u>	<u>7,515,379</u>	<u>7,739,127</u>	<u>8,665,008</u>	<u>490,335</u>	<u>484,863</u>	<u>483,695</u>	<u>525,152</u>
<b>NET SURPLUS/(DEFICIT) for the year</b>		<b>303,303</b>	<b>380,725</b>	<b>399,755</b>	<b>(65,448)</b>	<b>20,220</b>	<b>24,563</b>	<b>24,985</b>	<b>(3,967)</b>
Allocated to sustainability reserve	8	23,303	100,725	119,755	774,552	1,554	6,498	7,485	46,943
Allocated to (withdrawn from) general conference reserve	9	280,000	280,000	280,000	(840,000)	18,667	18,065	17,500	(50,909)
Year end exchange rates						15.00	15.50	16.00	16.50

**Notes**

- YGAP activities continue on slightly reduced level from 2019. Assumes new OPC funding contract 2020 - 2024 at SEK4m (additional core funding grant is to expand the education Programme).
- The targeted project income reflects IFWEA's ongoing commitment to achieve financial sustainability by achieving 22% of the total budget through self-generated income and by achieving 46% of the secretariat expenses through self-generated income.
- Secretariat includes staffing of 75% General Secretary salary plus full time Administrator, Project Manager, Education Assistant and a part-time Communications Manager.
- Secretariat costs assume a 6% inflation per annum, including staffing costs for general secretary, project manager, education assistant, communications manager and administrator.
- Secretariat costs include audit, accounting services and office expenditure.
- 66% of Secretariat staffing costs are attributable to the Education and Research programme activities.
- The 2023 General Conference (GC) total expenditure assumes the same US\$ cost as for the 2019 conference. An estimated 30% of the GC costs may be attributed to programme activities.
- The sustainability reserve provides stability in times of unpredictable shortfalls in funding, adverse inflation / exchange rate movements and provides a severance reserve.
- The general conference reserve sets aside funds every year to assist with the large conference costs every fourth year. It is fully utilised in 2023.

**IFWEA - BALANCE SHEET Summary forecast**

Appendix B

2 of 2

	Notes	Forecast 2020 R	Forecast 2021 R	Forecast 2022 R	Forecast 2023 R	Forecast 2020 £	Forecast 2021 £	Forecast 2022 £	Forecast 2023 £
<b>Four years ending 31 December</b>									
<b>ASSETS</b>									
Non-current assets	1	25,000	25,000	25,000	25,000	1,667	1,613	1,563	1,515
Cash	2	2,694,589	3,075,314	3,475,069	3,409,621	179,639	198,407	217,192	206,644
Other current assets	3	213,799	213,799	213,799	213,799	14,253	13,793	13,362	12,958
		2,933,388	3,314,113	3,713,868	3,648,420	195,559	213,814	232,117	221,116
<b>EQUITY &amp; LIABILITIES</b>									
Equity		2,910,861	3,291,586	3,691,341	3,625,893	194,057	212,360	230,709	219,751
Sustainability reserve	4	2,630,861	2,731,586	2,851,341	3,625,893	175,391	176,231	178,209	219,751
General conference reserve	5	280,000	560,000	840,000	-	18,667	36,129	52,500	-
Current liabilities	3	22,527	22,527	22,527	22,527	1,502	1,453	1,408	1,365
		2,933,388	3,314,113	3,713,868	3,648,420	195,559	213,814	232,117	221,116
Year end exchange rates	6					15.00	15.50	16.00	16.50

**Notes**

- 1 Non-current assets generally comprise of computer equipment, equipment and furniture. Assets are depreciated in accordance with accounting policies.
- 2 Cash assumes the annual surplus or deficit movement plus any depreciation.
- 3 Whilst there may be movements in both current assets and liabilities these are not expected to be material and have been left static for illustrative purposes.
- 4 The sustainability reserve provides stability in times of unpredictable shortfalls in funding, adverse inflation / exchange rate movements and provides a severance reserve.
- 5 The general conference reserve sets aside funds every year to assist with the large conference costs every fourth year. The next conference will be held in December 2023.
- 6 The exchange rate forecasts are an indicative estimate.

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FEDERACIÓN INTERNACIONAL DE ASOCIACIONES PARA LA EDUCACIÓN DE LOS TRABAJADORES**

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