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Union Organising and Partnership in the UK's Mature Sectors. The Cases of Manufacturing, Finance and Public Services.

Andy Danford, Mike Richardson, Stephanie Tailby and Martin Upchurch

More than ten years have now elapsed since the TUC launched its 'New Unionism' project in 1996. As has been well documented, in its early stages New Unionism embodied an attempt to arrest the decline of trade union membership and influence at work by incorporating certain elements of an aggressive organising approach associated with the North American 'organising model' (Carter, 2000 and 2006; Heery et al., 2000b). In some quarters, early hopes for the potential of the organising model were influenced by the emergence of a distinctive 'union renewal' debate. In an essentially grass roots-based argument great stress was placed upon the need to democratize union form and hierarchy by locating rank-and-file union activists as core agents in processes both of membership mobilization at work and democratic practice within union structures and broader community activity (Fairbrother, 1996; 2000). Thus, in the context of union decline in the workplace and civil society, looked at through the prism of renewal, the organising model was seen as containing the potential to reverse this decline by shifting the form of trade unionism to something less concerned with membership recruitment per se and more focused on trade unionism as process. That is, if strong workplace union organisation is to be built and sustained in the longer term, then trade union activity required re-constructing around principles of member participation at multiple levels. As Carter (2000 and 2006) has consistently acknowledged, however, in too many cases the actual adoption of the organising model has been marked by a tendency to de-prioritise the building of rank and file organisation and instead to rely on leadership-driven processes at the centre with an inevitable focus on short-term recruitment.

Considering the pivotal role of union members in the renewal thesis there has been remarkably little research that attempts to systematically elicit their views on these questions. One notable exception is the work of Christian Lévesque and his colleagues in Canada. Their study of the impact of increasing labour market heterogeneity on union identities surveyed 1500 union members in the Quebec Province (Lévesque et al., 2005). Apart from establishing overwhelming endorsement of the necessity of union organising at work their results showed that this pattern was weaker, and members were less likely to support traditional, more oppositional union forms, if members perceived their local union as less democratic. This highlighted the key processual challenge for union renewal in that member involvement and worker solidarity were not natural, spontaneous phenomena but outcomes of a 'process of socialisation, of repeated efforts to develop alliances and complicities between workers despite the differences that might separate them' (2005: 419).

There exists some recent case study research of organising campaigns in the UK that confirms this conclusion. Badigannavar and Kelly's (2005) work on the higher education sector found that where the local union was able to establish more powerful collective action frames by voicing worker concerns and building stronger identification between workers and the union then organising outcomes were more favourable. Similarly, Simms's (2007) multi-sectoral case studies of organising campaigns in greenfield establishments found that the organising model was more likely to generate success when two conditions obtained. The first was the construction of viable union structures at the workplace. The second was elevating rank and file activists into leading positions alongside full time officers in co-ordinated multi-site organising campaigns.

These case studies confirm the continuing resonance of the union renewal thesis. That is, organising strategies which attempt to sideline the careful fostering of rank and file organisation and democratic structures in the interests of short term membership gains are likely at some point to relapse into the long term expense of servicing dwindling numbers of

disillusioned union recruits. Heery et al.'s (2003) surveys of national union strategy governing new organising processes suggested that many unions have, indeed, come to the policy position of supporting the building of workplace union structures rather than recruitment for its own sake. However, they also found that this pattern was uneven in that support for the organising model increasingly became part of a multi-strand approach, which for other writers, included quite contradictory forms of unionism, the most contentious of which in ideological terms is 'workplace partnership'. The principles of partnership were incorporated into the TUC's New Unionism project in the aftermath of the 1997 general election. The New Labour government provided an important impetus for this development, both materially, through the creation of the Department of Trade and Industry's Partnership Fund and ideologically, with the government's emphasis upon 'modernising' employment relations with a distinctive individualising agenda (Stuart and Martínez Lucio, 2005; Smith and Morton, 2001).

The evidence suggests that unions which sign up to partnership relationships with employers do not necessarily enter into a uniform type of power relation. For instance, Kelly (2004: 271) distinguishes between different forms of partnership in terms of variations along a continuum in the balance of power in the employment relationship. Two main contrasting forms are outlined: 'employer-dominant' partnerships characterised by a balance of power in favour of the employer with partnership agendas mostly controlled by employers and characterised by union compliance; and 'labour-parity agreements' marked by a more even balance of power with partnership agendas that reflect the interests of the employer and the union. Writing in a similar vein but adopting a mode of analysis associated with the sociology of risk, Martínez Lucio and Stuart (2005: 808-09) delineate different partnership forms two of which are seen to be more prominent. The first is the transitional form, or 'marriage of convenience' associated with productivity coalitions and aimed at securing mutually agreed short-term objectives. Such partnerships limit the risk of conflict over unreciprocated longer term commitments and expectations. The second is the coerced form of partnership, or 'shotgun wedding'. This is a more elaborate example of Kelly's 'employer-dominant' form in that the management-union relation is marked by coercion and compliance and often designed and sustained by elites within the employer, and sometimes the union too, both detached from rank and file interests.

The extent to which union support for partnership is a reflection of proactive strategy rather than a function of both the power of the employer and the failure or inability of unions to resist the employers' increasingly unitarist interpretation of union recognition is a moot point. Examples of the latter scenario, involving a critical weakening of embryonic union organisation, can be found in a recent volume on union organising campaigns (see Findlay and McKinley, 2003; Gall, 2003; Taylor and Bain, 2003). Moreover, current workplace-level studies of partnership have generated little concrete evidence of the 'mutual gain' that we might associate with 'labour parity' or 'marriage of convenience' partnership forms. One recent study by Samuel (2007) argued that partnership can succeed in certain circumstances and notably if management-union relationships at the inter-personal level are propitious. But his case studies are curiously uni-dimensional, focusing solely on consultation processes rather than more concrete indices of union effectiveness under partnership, such as collective bargaining processes, bargaining outcomes, and patterns of union activism at the workplace. Other writers more sympathetic to partnership (Oxenbridge and Brown, 2004) found that in workplaces where more 'robust' partnership relationships obtained, positive outcomes were generated in the form of better early warning systems in processes of dispute resolution, union re-positioning in acting as intermediaries to improve management's message and union success in acting as efficient transmission belts for management communications. But it is hard to discern how these can be regarded as an encouragement to autonomous trade unionism and rank and file democracy. Indeed, it is no surprise that Oxenbridge and Brown uncovered a number of problems in this respect, not the least, the distancing of stewards from

their members' concerns (for further evidence of this in other partnership contexts, see Danford et al. 2003 and 2005).

More critical writers have highlighted also a number of primary concerns related to the employment relationship and the labour process. For instance, Kelly's (2004) review of social partnership agreements in the UK found no evidence that different partnership types compared favourably to non-partnership agreements with respect to wages and conditions settlements or union density. Moreover, the employer-dominant form was more likely to assist employers in labour-cutting processes. And what of the labour process and job control? Whilst there is insufficient evidence of the impact of workplace partnership on traditions of collective job controls in the unionised sectors, a number of recent research projects have made some progress in this regard. For example, in a series of related articles governing the introduction of teamworking in the UK's steel sector, Bacon and Blyton (2007; 2006) found that conflictual union approaches to bargaining on this issue generated demonstrably more favourable worker outcomes compared to co-operative forms of unionism. More fundamentally, whilst Jenkins's (2006 and 2007) multiple case study research into partnership in traditional manufacturing settings discerned nuances in the nature of personal management-union relations, a common thread linking her studies was how workplace unions were forced to forgo the traditions of job control and engage in initiatives which merely facilitated the introduction of company policy on management's terms.

Overall, the pattern of union trajectory in the 10 years since the birth of 'New Unionism' seems akin to a position of 'alternative routes to partial failure'. For sure, if we focus solely on UK membership totals then British unions can be seen to have enjoyed at least some success in stemming the long decline suffered under nearly 20 years of Conservative rule. And notwithstanding the concentration of union members in the public sector there is no denying a shift in the union membership base towards more women workers and the services industries. Nevertheless, if we look for patterns of progress through the prism of trade union *process* at work and beyond, then the evidence seems to point to a gradual though persistent erosion of union influence at the point of production and service. For instance, the latest WERS results indicate a continuing decline in union membership, recognition, lay representation, joint regulation via collective bargaining and collective action (Kersley et al., 2006; see also Gall, 2007). To augment this debate and provide further insight into the nature of local union processes and dynamics in the highly challenging context of Britain's UK's neo-liberal political economy, this paper presents longitudinal analysis of the comparative fortunes of different workplace unions (and in one case, non-union employee representation) over a number of years. Some of these have adopted strategies based on oppositional organising approaches whilst others have tended towards more co-operative forms, in some cases outright partnership. The paper begins by presenting survey data of the performance of workplace unions with contrasting organising forms in the South and South West England during the immediate aftermath of the launch of New Unionism. This is followed by multiple case study analysis of the fortunes of a variety of workplace unions in six long-established workplaces spread across the manufacturing, finance and public services sectors. The key research questions addressed are: first, what differences, if any, can be discerned in union performance during the early stages of strategy development; second, to what extent have workplace unions engaged with the local manifestations of new capital accumulations strategies in the private sector and the drift towards privatisation in public services; and third, to what degree have the strategic positions adopted by local unions affected processes of member participation and union democracy at work?

Research Data

The data upon which this chapter's analysis is based are drawn from two separate research projects. The first, funded by the Leverhulme Trust, sought to evaluate the TUC's 'New Unionism' project over the period 1998-2000, a time when New Unionism embodied some dimensions of the organising model (see Heery et al., 2000). As we noted above, during this period (in the immediate aftermath of the election of the first New Labour government in 1997), the TUC also began to develop an alternative - and in many respects quite contradictory - organising strategy based on the idea of workplace partnership (TUC 1999). This development enabled us to carry out some rudimentary comparative analysis at a time when both approaches were in the early stages of organisational development. The second project, funded by the ESRC's Future of Work Programme, resulted in a more searching comparative analysis of union strategy during the subsequent period when different organising forms might have been expected to become more embedded. For this, in-depth case study research was completed between 2001-03 with some additional follow-up interviews between 2005-08.

The first project focused on trade union activists' experiences of organising in mostly well established workplaces in South West England where formal union structures existed and a clear potential for in-fill recruiting obtained. This reflected broader trends in union strategy at the time which prioritised better organising and recruitment in workplaces with union recognition over more challenging greenfield sites (Heery et al., 2003). The data comprised a survey of 356 worker representatives in 52 work establishments, a survey of 70 union convenors employed in these work establishments, and semi-structured interviews with over 100 worker representatives and 15 full-time union officers (for a comprehensive analysis of this material, see Danford et al., 2003). The next section presents some fresh analysis of the questionnaire survey data, comparing the organising and partnership processes in their embryonic phases. The second project focused on the dynamics of workplace partnership (and alternative union strategies) in six organisational case studies. These were located in manufacturing (two aerospace studies), finance (one de-mutualised building society and an insurance firm) and the public sector (one NHS trust and a large local authority). For this project a total of 374 management and worker interviews were completed and 2,575 questionnaires collected from managers, manual and non-manual workers. Of the interviews, over 40 were completed with worker representatives, plus in one case in the finance sector, members of a non-union 'Partnership Council'. The second half of this chapter focuses on the interview data with union representatives and HR managers in each of the case studies. For a more comprehensive analysis of the interviews and worker surveys, see Danford et al. (2005) and Upchurch et al. (2008).

Organising and Partnership Compared: Early Stages

Our earlier interviews with union convenors and worker representatives enabled us to categorise the form of union organising in each of the workplaces visited. Unions falling into the 'Organising' category were those cases where representatives articulated a clear sense of union independence (involving recurrent oppositional stances to management) and where activists met regularly to discuss collective bargaining strategies and membership recruitment campaigns. In many respects these were union forms that emphasised a renewed organising approach by processes of 'stimulating activism and strengthening trade unionism in the workplace in order that workers can resolve their own problems without recourse to external representation' (Heery, 2002: 27). The 'Co-operative' category comprised workplace unions that had either maintained a tradition of co-operative bargaining relationships with the employer, or had more recently developed an informal partnership arrangement, or adopted a more formal workplace partnership underpinned by written agreement (for a distinction

between these, see Bacon and Samuel, 2007; Danford et al. 2005: 142-145; Oxenbridge and Brown, 2002: 191-192). In the cases of informal partnership, union representatives described an unwritten but clearly articulated co-operative relationship with management which aimed to secure mutual gain workplace outcomes. In the formal partnership cases, of which there were few, there existed a written agreement adumbrating joint partnership principles and processes. A third category of 'Neither' included a variety of workplace union organisations that had not adopted any of the strands of 'New Unionism'. Some of these had fairly healthy membership densities but were often marked by low levels of union activism. Others were clearly weak in term of membership, density and lack of activist presence. In these cases, full time officers took a more prominent role in initiating recruitment campaigns and servicing existing members.

The quantitative data presented here provide some indication of the comparative effectiveness of the different union forms, albeit in some cases, at an early stage of their development. We consider in turn, membership and recruitment data, institutional measures of organisational strength, and union influence. Table 1 shows the distribution of the three categories based on the reports of worker representatives. Overall, 41 per cent of the representatives surveyed were based in workplaces where facets of the organising model had been adopted, just under a quarter were in workplaces where partnership or co-operative unionism existed and 33 per cent were in workplaces where neither of these conditions obtained. Use of the organising model was most common in aerospace, a sector that still dominates manufacturing in the South West region and which is heavily unionised. Partnership approaches were more likely to be found in the small number of privatised utilities and local authorities in the sample. It is also noteworthy that the organising approach was more common in the AEEU and MSF (now sections of Unite). The AEEU organisational base comprised aerospace and manufacturing, sectors associated with traditional adversarial industrial relations. MSF was notable for the introduction of a grassroots 'Organising Works' campaign at the time of the research.

Table 1. Patterns of organising reported by worker representatives, by sector and union (n = 356)

	Organising (%)	Co-operative (%)	Neither (%)
All	38	28	34
Aerospace	71	12	17
Manufacturing	26	33	41
Insurance	0	50	50
Privatised Utilities	0	70	30
NHS Trusts	26	22	52
Local Government	0	72	28
Universities	0	0	100
AEEU (now Unite)	50	35	15
GMB	29	21	50
MSF (now Unite)	38	19	44

Our analysis of membership levels and recruitment data highlighted a number of features. The first was that although the scope for in-fill recruiting was greater in workplaces that had not adopted organising model initiatives, the average number of members recruited per workplace was actually higher for the organising unions (Table 2). Moreover, and more pertinently, there existed a large gap in membership retention between these organising unions and the two other categories. On average, the 'organising' unions achieved a membership increase of 17 at each workplace between the years 1999-2000 compared to an average increase of just four by

the co-operative unions and overall membership loss by the weaker 'neither' group[1]. In the main, this gap could not be attributed to any comparative lack of membership recruitment activity. As Table 3 indicates, at the time of the research there existed a good deal of recruitment campaigning across the different workplaces (around two thirds of establishments) with no significant differences between the three categories. As we shall see in the case study section, rank and file assessment of the utility of the different forms of union activity - and how well they represent member interests - constitutes a more telling factor for assessing this uneven performance in membership retention.

Table 2. Membership and recruitment data (workplace averages), by organising category, as reported by union convenors (n = 70)

	Size of Membership	Membership Density	Members recruited previous 12 months	Overall change in workplace membership	Member/Rep Ratios
All workplaces					
Organising	349	71	22	+17.0	25
Co-operative	295	61	17	+4	34
Neither	147	61	10	-3	44

Table 3. Recruitment activity in previous 12 months, by organising category, n = 70

	Organising (%)	Co-operative (%)	Neither (%)
Recruitment campaign in past year	69	67	53
Leafleting non-members	50	44	47
Literature targeted at specific groups	53	44	32
Direct postal shot to non-members	6	24	5
Email non-members	3	6	5
Use of recruitment teams	16	18	26
Use of mapping techniques	25	28	21
Social event for non-members	3	6	16

To assess the relative strength of each workplace union organisation we used three different indices. The first measured 'the depth and importance of representation at the workplace' by collecting data on the number of workers per representative (Cully et al. 1999: 193). The 1998 Workplace Employee Relations Survey (the latest survey at the time of this first project) showed that this varied directly with size of workplace, averaging 28 members per representative and ranging from 17 in small establishments of 25-49 employees to 53 in larger workplaces of over 500 employees. Comparing this pattern to our three union categories, we found that workplace organisation tended to be significantly stronger for the organising unions compared to unions which followed either the co-operative route or neither of these (Table 2). Whilst, as Badigannavar and Kelly (2005) have shown, developing a critical mass of activists is partly a function of the size of the workplace (and the organising unions did tend to be based in the larger workplaces), our interview data showed that the more independent and adversarial orientations adopted by the organising unions were more likely to attract the interest of new activists. A similar pattern of difference in organisational strength can be discerned from our other two indicators: the frequency of union representatives' meetings (such as, joint shop stewards committees) and of meetings between union

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[1] Convenors collected recruitment data from workplace membership lists and branch records. The researchers were also able to compare these changes to head office membership data for 1998.

representatives and management (Table 4). Unions that adopted the organising approach seemed stronger in matters of activist organisation and engagement with management. It was also noteworthy that unions which adopted neither organising nor co-operative strategies looked particularly weak.

Table 4. Frequency of workplace meetings, union representatives and management, by organising category, n = 365.

	Organising (%)	Co-operative (%)	Neither (%)
Frequency of union reps meetings			
More than monthly	67	30	20
Monthly	24	43	31
Bi-monthly	4	5	13
Few times per year or never	5	22	36
Frequency of meetings with management			
Weekly	49	48	16
More than monthly	41	23	4
Monthly	10	20	22
Few times per year or never	0	9	58

Finally, we evaluated the question of union influence over the regulation of the employment relationship by asking different sets of questions governing the scope of collective bargaining at each workplace and whether certain issues related to employment conditions and work organisation were subject to either negotiation or consultation.

Table 5. Issues subject to negotiation or consultation, by organising category, n = 356

	Subject to Negotiation (%)	Subject to Consultation (%)
How pay is decided		
Organising	84	16
Co-operative	71	29
Neither	54	46
How changes to working hours are decided		
Organising	76	24
Co-operative	63	37
Neither	47	53
How redundancy issues are decided		
Organising	51	49
Co-operative	51	49
Neither	33	67
How the introduction of new working practices is decided		
Organising	71	29
Co-operative	63	37
Neither	42	58
How the use of non-permanent staff is decided		
Organising	49	51
Co-operative	33	67
Neither	20	80

The survey measured the scope of collective bargaining and consultation by asking representatives whether, during the previous three years, they had been involved in discussions over a range of 22 different issues encompassing pay and conditions, restructuring and rationalisation, skills training, discrimination at work, flexible working, maternity and paternity rights, use of non-standard employment contracts and workplace stress. There is

insufficient space here to present all of the results but it was noteworthy that the representatives in the co-operative unions were more likely to report greater scope (an average of 9.3 issues) compared to the organising unions (7.3 issues) and the 'neither' group (5 issues). Perhaps a more robust measure of union power and influence is provided by questions governing joint regulation of terms and conditions. That is, to what extent do union activists exert influence though traditional collective bargaining processes as opposed to weaker forms of consultation and management communication? In this respect, worker representatives were asked whether the five employment issues listed in Table 5 were subject to either negotiation or consultation. The results showed that compared to the co-operative union group and weaker 'neither' group, representatives in the organising unions were more likely to report negotiation over four out of the five issues (pay, working hours, new working practices and use of non-permanent staff).

To sum up these initial patterns, our survey data found little evidence to support the argument that co-operative forms of workplace trade unionism, such as the partnership approach, generated more favourable outcomes for either union organisation or level of union influence. In fact, it was those unions that adopted a more oppositional and independent stance, an orientation more associated with the 'organising model', that displayed better records both in recruiting and retaining members and recruiting and organising workplace activists. Equally, if collective bargaining is taken as the central measure of union influence then the organising approach also seemed the more effective.

Workplace-level Case Studies: Manufacturing, Finance and the Public Sector compared

The second project, based on ESRC Future of Work project data, focused on the dynamics of union strategy in five employers selected from the original survey research. In addition, a sixth case explored the dynamics of partnership in a non-union firm. Much of the case study work was carried out between 2001-03 but in four cases additional interviews were completed between 2005 and 2008.

Partnership and organising in a high skill manufacturing sector
These two case studies were of union organising patterns in manufacturing plants in the high skill aerospace sector. Both plants (*Airframes* and *JetCo*) employed approximately 4000 workers each with large numbers of designers and skilled shop-floor production workers. There were two main trade union bargaining groups per plant each dominated by the AMICUS trade union (now UNITE). The majority skilled production workers were represented by AMICUS-AEEU; technical staff were represented by AMICUS-MSF. Manual union membership density at both plants was virtually 100 per cent whilst non-manual densities for AMICUS-MSF were around 80 per cent in recognised areas (which excluded some graduate engineering and commercial departments). At both plants the architecture for collective bargaining and consultation comprised conventional negotiating committees covering pay and conditions plus a number of single site and multi-site consultation committees and works councils.

The development of partnership at each plant requires viewing in the context of the pressure of intense market competition in the sector and management's objective of continuously streamlining labour deployment and cutting costs via processes of organisational restructuring. This restructuring intensified during the late 1990s and followed a similar pattern in both plants. Previously unitary, single site divisions were broken up into a plethora of different business units responsible for specific product families or production processes. Management's objective was to secure improved financial control over every aspect of the business, albeit under the guise of 'managerial decentralization'. In this respect, business unit matrix structures were introduced primarily to reduce costs, particularly labour costs, by

securing greater transparency and unit accountability. The specific instruments of labour control took the form of increased labour flexibility, teamworking and the use of outsourcing and agency labour. In both plants, management sought also to recast existing traditions of adversarial industrial relations by developing partnership relationships with the different union bargaining groups. This was seen as an essential pre-cursor to securing a degree of worker compliance with, or even acceptance of, the continuous process of organisational restructuring and rationalisation. Senior managers stressed how partnership should be seen as a psychological process, a battle of 'hearts and minds' that culminates in a permanent re-alignment of trade union priorities towards the companies' new core objectives.

The union responses to this managerial challenge divided into two contrasting camps and both were present in each plant. The manual bargaining group at *Airframes* and non-manual bargaining group at *JetCo* both came to support the partnership approach whilst the non-manual group at *Airframes* and the manual group at *JetCo* each adopted oppositionalist positions.

The two pro-partnership union groups were led by convenors who, despite displaying differences in the extent of their trust in management, had converted to the idea of partnership on the basis that it was seen to contain the potential for regaining a measure of union influence lost during the Thatcher-Major era. At *Airframes*, the manual union group entered into an informal partnership arrangement with the company in 2000, an arrangement that promised more open and systematic negotiating and consultation on terms and conditions, staffing levels and company strategic issues. At *JetCo*, the non-manual union group signed a formal partnership agreement two years earlier, in 1998. As well as emphasising 'trust and openness' in management-union relations, the agreement authorised the formation of a series of joint working parties to discuss prominent management concerns such as reductions in engineering labour time and use of sub-contract labour.

For both sets of unions, the 'balance sheet' of partnership outcomes, observed over a number of years, was mostly negative. Whilst adopting the discourse of 'mutuality' management actually treated partnership in an instrumental fashion, as a means of legitimating change and securing union approval for employer-dominated agendas. At the same time, workers began criticising their convenors for 'being in management's pockets' and 'sticking their noses up there' as members variously put it. Moreover, a series of deleterious material outcomes generated a growing antipathy towards partnership amongst activists. Labour rationalisation provided one example. Despite voicing commitment to enhancing job security by minimising potential job loss and providing unions advance warning of any threat to staffing levels, both sets of management announced a series of major job losses between 2002 and 2005. These decisions not only took the unions by surprise (denoting an absence of early warning) but no provision was made for the discussion of alternative solutions. The development of the new, 'qualitatively different' partnership relationships seemed to have no impact on the numbers of lost jobs or the redundancy process itself. This lack of managerial trust also impaired the emergence of any meaningful 'employee voice' at the plants. At *Airframes*, for example, a merger with an Italian aerospace multinational required a lengthy process of corporate discussion over a three year period. But our interviews with shop stewards and workers highlighted a widespread feeling that consultation with unions and workers on this issue was minimal. This was despite the implications of the merger for jobs, responsibilities and workloads. Another example was provided at *JetCo*, where management was seen to cynically exploit the introduction of the EC Directive on Information and Consultation in the Workplace. When, in 2005, the company formed a new national Information and Consultation Council leaders of both main bargaining groups took the decision to place less experienced shop stewards on this committee, partly to give them experience but equally, because the new council was perceived as yet another layer of consultation which exacerbated the already excessive demands on senior stewards' time. During our later visits to the plant in 2006, the

non-manual convenor described how management attempted to exploit the new forum by engineering a shift in the nature and locale of collective bargaining. Specifically, discussions governing a number of contractual issues that traditionally fell within the remit of plant-level collective bargaining were moved to the new national council and implemented once 'formal consultation' had taken place. These included the use of agency labour, changes to a redundancy agreement and the standardisation of UK conditions.

The two bargaining groups that formally rejected management's overtures to partnership (the manual unions at *JetCo* and the non-manual unions at *Airframes*) did so partly on the basis of distrust of management, partly because partnership was seen as a perverse political development (in the sense that, as one convenor put it, 'you can be with management or you can be with your members but you can't be with both') and partly as a corollary of a distinctive style of leadership. Both groups placed much greater emphasis upon democratic accountability to rank and file members through practices that facilitated grassroots participation and collective discussion. For example, regular plant meetings, group meetings, shop steward patrols, newsletters and emails. And in the case of *JetCo*, many senior activists (including five plant convenors) were members of the AMICUS Unity Gazette and formed part of an oppositionalist political tradition encompassing 'Old Labour', the Bennite Left and the SWP. The union form of these two bargaining groups corresponded, in many respects with the organisational precepts of union renewal.

To what extent did these oppositional stances offer advantages over their partnership counterparts? As far as immediate gains are concerned, there were examples of notable successes. At *Airframes*, for instance, the main union AMICUS-MSF proved very successful in recruiting young graduate engineers and scientists (who could be prone to questioning the relevance of trade unionism for their occupation) and then fostering vibrant group activity in the design departments. In one case, groups of new engineering members developed a successful, snowballing campaign around core 'justice at work' issues such as supervisory bullying and forced management to the negotiating table before the campaign was launched with the local media. At *JetCo*, the manual unions more effectively countered the threat of job loss by frustrating management attempts to transfer work to other sites. For example, in 2001, AMICUS-AEEU stewards mobilised their members into walking off the job and barricading part of the factory until management withdrew a threat to transfer engine test work to a sister plant in the Midlands. However, this more militant form of union organising did have limitations. Just as Beynon (1984) described the organisational constraints that arose from the rank and file ideology of a 'factory class consciousness', union strategy at *Airframes* and *JetCo* still displayed a plant-based sectionalism that de-prioritised the construction of solidarity links and joint action with other plants in the UK and globally. This stood at odds with the reality of an internationalised aerospace capital which, whilst appearing fragmented at the plant level (through the growth of profit centres and business units), was actually characterised by a more unitary strategic process of global capital mobility through merger processes and systemic international outsourcing.

Union and non-union partnership in financial services
The two financial services workplaces were case studies of a partnership arrangement with a recognised trade union and a non-union 'partners council'. The first of these, *InsuranceCo*, specialised in legal expenses insurance within a large European MNC and employed 500 staff; the second, *FinanceCo*, was a demutualised building society employing 2,700 staff. In both cases, women comprised two thirds of the workforce. At *InsuranceCo*, the union AMICUS (and formerly ASTMS) had been the sole recognised channel for collective consultation and negotiation for three decades. At its height, in 1991, membership density reached 80 per cent, however, by the time of the research in 2002-03 this had fallen to around 45 per cent. In 1999, management and AMICUS signed a partnership agreement that committed the company to providing 'the greatest possible stability of employment and

earnings' in return for union cooperation in the implementation of 'measures designed to sustain or increase efficiency or profitability'. At *FinanceCo*, a weakly supported staff association had been disbanded in the early 1990s. It was replaced by a Partners Council in 1992, a body comprising elected employee representatives from different departmental constituencies and encompassing all employee grades. In 2001, following abortive attempts by UNIFI to recruit members and gain recognition management put some effort into raising the profile of the Partners Council and broadening the scope of employee consultation in order to undermine any future UNIFI campaigns.

The UK financial services sector has been subject to considerable reorganisation in recent decades, a process of change that has centred on business strategy, corporate structure and work organisation. The underlying pattern is one of a recomposition and concentration of finance capital following waves of mergers in the banking, building society and insurance industries. At the same time, priorities of economies of scale and increasing market share, facilitated by developments in information and communications technologies, have generated a reorganisation of the old boundaries between the main sub-sectors and product types. Indeed, the cross-selling of financial products, driven increasingly at the individual level by sales targets and incentive pay systems are now systemic. These strategic changes coupled with the new customer service ethos have become embodied in new work organisation within profit centre structures. For example, call centre operations and customer-focused teams. Elements of these changes were present in both case studies, the more so at *FinanceCo*, a demutualised building society that recently became part of a UK-based banking and financial services group offering a wide range of services in banking, mortgages and insurance. *InsuranceCo* remained in a niche insurance market, nevertheless, its management teams were pursuing a raft of efficiency savings and restructuring performance management systems.

Our research found that the different types of partnership (union and non-union) at the two firms seemed to have little favourable impact upon the 'representation gap' that became a widespread and problematic feature of UK industrial relations during the two preceding decades. At *FinanceCo*, whilst many employees acknowledged an increase in the quantity and quality of company communications provided by management and their Partners Council representatives, few felt that they exerted any direct or indirect influence. Enforced employee quiescence rather than 'employee voice' seemed to be the dominant characteristic of the firm's industrial relations. The Partners Council was seen by representative and employee alike as lacking the credibility of full trade union representation since, despite management's intention to treat the Council as a powerful mechanism for representing staff interests it had few sanctions to hold management to its commitment to consult and no sanctions to bring to bear to challenge management decisions. For example, despite different managers' claims that partnership had broadened the scope of consultation, key distributive issues that are central to workers' immediate interests, issues such as pay, conditions and other employee benefits, were excluded from Partners Council agendas. During a return visit to the site in 2005, the superficiality of the partnership became further exposed when management decided to sell the branch network and effect job cuts. Council representatives found themselves cut adrift from redundancy discussions when the firm instigated corporate consultations with a union recognised in the company main operations abroad.

At *InsuranceCo*, although our employee attitude survey data suggested higher union influence compared to *FinanceCo*'s Partners Council, this was mostly delimited to individual processes such as grievance and disciplinary representation. Our interviews with rank and file members also highlighted a problem of partnership 'distancing' in that many felt that their union operated remotely from their needs and interests whilst local union culture and practice provided few opportunities for democratic discussion of workplace problems. Overall, the partnership agreement, and the union's co-operative stance, had not acted to increase employees' direct or indirect influence at work. Neither had the agreement generated any

sense of mutuality in material outcomes. Management succeeded in improving efficiency and labour productivity by introducing greater flexibility in working time and task enlargement but improvements to pay and conditions had been modest. For example, in our survey, two thirds of employees reported that their work had intensified over the previous three years; nearly three quarters reported increases in work responsibilities; over a half reported increases in task flexibility; and over a half indicated dissatisfaction with their pay. Perhaps it was no surprise to discover that by 2008, union membership had nearly halved: from 45 percent down to 27 per cent (interview with HR manager).

Therefore, both cases of partnership showed little promise in the likelihood of generating mutual gain or, in the case of *InsuranceCo*, concomitant increases in worker support for the union. A panoply of 'soft' human resource management techniques were in place to provide collective 'employee voice', downwards and two-way employee communications, team-based discussions and individual appraisals, and yet employees felt typically a lack of individual involvement in organisational decision-making and only weak collective representation. Within the institutional context of a high pressure commercial environment where employers' prime focus was on improving sales performance and profitability, the two sets of management did not regard partnership as a mode of employee representation that might weaken their prerogatives in any meaningful way. And certainly, for employee representatives, the new partnership processes – in their union and non-union form alike – lacked the means or potential to countervail these prerogatives.

Co-operation in the public sector
Case studies were employed involving the development of partnership at a local authority (*CityCo*) and an NHS Trust; the latter located on two main sites (SiteA and SiteB). These two sites were formerly two independent trusts and merged in 2000 to form one General Hospital Trust (*GHT*). *CityCo* employed around 18,000 manual and non-manual staff, and *GHT* approximately 7,500 direct medical and support staff. The main trade unions representing workers at *CityCo* were UNISON, TGWU (now Unite) and GMB. At *GHT* the RCN and UNISON were the largest unions. MSF (now Unite) also had an important and active presence in representing laboratory staff. Overall trade union membership density in both cases was approximately 50 per cent.

Given the traditional view of the state as a model employer and the willingness of public sector unions to work with rather than against Labour administrations – together with the end of nearly two decades of Conservative governments running public services with privatisation in mind – it was, perhaps, unsurprising that union leaderships in local government and the NHS tended to welcome the development of partnership working. What they overlooked, or did not envisage, was the potentially negative impact on members' quality of working life of New Labour's drive for greater efficiency and cost effectiveness of public services. The introduction of both Best Value in local government and the modernisation agenda (*agenda for change*) in
the NHS provided the instruments to carry through this programme. New systems of financial control together with classic total quality management criteria, such as benchmarking, performance monitoring, training and outsourcing, were employed to cut costs, secure continuous quality improvement, bring about cultural change and, where it was felt necessary, open up the public sector to market forces. To achieve these objectives the government recognised that it would be of great assistance to secure support from the trade unions. Therefore, partnership principles of co-operation, consultation and trade union and staff involvement were incorporated into New Labour's public sector modernisation programme.

At *CityCo*, although there were significant clusters of militant shop stewards in some departments, a collaborative relationship existed between the local trade union leadership and management throughout the 1980s and 1990s when the authority was mostly Labour-

controlled. Following Labour's national election victory in 1997, and the introduction of Best Value as a replacement for Compulsory Competitive Tendering (CCT), pilot partnership initiatives were launched in some council departments. Local union officials positively engaged with partnership working because they felt that this was the best way to defend their members' interests in the light of the perceived danger, expressed explicitly by one UNISON official, that Best Value was 'really an outsourcing exercise'. Thus, unions prioritised participation in Best Value steering groups and Best Value review panel meetings; the latter carrying responsibility of determining whether the provision of local services was best delivered in-house or by an external body. Increasingly, therefore, the union strategy of engaging in partnership was directed towards the fight to keep work in-house. This strategy was regarded as the best way to maintain members' job security despite the fact that to beat external competition unions would risk conceding greater labour flexibility, tighter monitoring of work and increases in workload. The rationale behind this strategy, according to one TGWU official, was that 'if it looks like getting nasty…there's even more reason to be involved in it, because you could be into some form of damage limitation exercise'.

Partnership at *GHT* first emerged on SiteB in 1997 in the aftermath of a union dispute over the imposition of car-parking charges. In order to rebuild relationships, and provide a platform for sustaining co-operation, a partnership agreement between the unions and management was signed. A new joint union committee (JUC) was established to feed into a joint-site negotiating and consultation committee comprising both staff and management representatives. In addition, a partnership forum was formed comprising all JUC members and Trust executive and operational directors to discuss key strategic issues. While this partnership arrangement had both the support of the management and the majority of the unions, the merger of the two sites presented difficulties for union cohesion in that whilst SiteB unions adopted more co-operative stances with management, at SiteA a longstanding 'confrontational culture' prevailed. According to one UNISON official, the adoption of SiteB's approach, following the merger, resulted in tensions because 'on the union side I know that the [SiteA] people felt taken over by the [SiteB] unions.' There was some dissention from MSF activists at SiteA. Here, in the years preceding the merger, MSF had rejected partnership working in favour of assertive workplace activism and the pursuance of an organising approach to union recruitment and membership involvement. This approach had contributed to a significant increase in MSF membership.

Our case study research in the years following these developments showed that eventual outcomes for workers were mostly negative in both public sector organisations. At *CityCo*, initial union participation in partnership pilot schemes failed to stem extensive labour rationalisation in areas where Best Value was introduced, despite the 'success' of keeping these services in-house. For example, the fear expressed by one *CityCo* manager that Best Value reviews would culminate 'in downsizing' was borne out in the local taxation division where partnership working was piloted. Staff numbers were cut from 134 before the review to 104.5 full-time equivalent positions in 2002; a further 27.5 staff cuts were planned to meet government targets over the longer term. For remaining staff, changes in work organisation and technology were introduced to assist employees to work more productively and effectively in order to reduce labour input and costs. Our data showed that these types of changes resulted in widespread patterns of work intensification. In the light of this experience, the main *CityCo* trade unions came to distance themselves from formal partnership and reverted to former patterns of corporate-level accommodation mixed with occasional opposition to new council initiatives at departmental level.

At *GHT*, partnership at both sites served to centralise union activity and resources as senior representatives became enmeshed in time-consuming management discussions on operational policy and strategic direction of the newly formed trust. The corollary of this was that the workplace unions became more detached from their rank and file base, particularly

organisations such as the RCN which had traditionally displayed a servicing approach to union-member relations. At the same time, managerial concern with budgetary control, compliance with patient throughput targets and cuts in the use of agency labour (with concomitant increases in the labour utilisation of permanent staff) led to widely reported problems of work intensification and workplace stress. From the viewpoint of many rank and file members, their partnership trade unions looked, at best, an irrelevance in these circumstances, and at worst, guilty of collusion in the management of these outcomes. Our questionnaire survey at the time showed that less than 40 per cent of members felt that their union took notice of members' problems; only a quarter felt their union was good at communicating with members; less than 30 per cent felt their union was taken seriously by management; only a fifth felt that their union made a difference to what was like to work at *GHT*; and less than 40 per cent felt any loyalty to their union.

Overall, the two public sector case studies showed how union engagement in partnership was wholly ineffective in challenging many of the potentially negative processes associated with the imperatives of financial control in the so-called 'modernised' public services. Equally, whilst there remained solid support for union membership and representation amongst many employees, there was little confidence in the efficacy of union representation offered by the partnership union form. Notably, MSF members at *GHT* were an exception. Our data showed that they had greater confidence in their union to deal with members problems, a legacy from MSF's organizing approach and more independent local union activism.

Conclusion

Despite the relatively large volume of resources dedicated to union organising campaigns in recent years very little headway has been made in securing increases in union recognition, membership density and grassroots activism (Gall, 2007; Kerlsey et al., 2006). Whilst a number of campaigns have generated some notable successes, unions in the UK have struggled to build sufficient organising momentum in the face of employer opposition, the limited utility of union recognition legislation and an ongoing decline in the quantity of workplace representatives. This is particularly the case in the private sector where the decline in membership density is reaching acute levels. In this context, there does seem to be some logic to the proposition that union pragmatism with regard choice or mix of organising strategies, that is, 'what works' in different organisational contexts, should take precedence over ideological positions governing union form and workplace politics. The same applies to another related argument, that until British unions are able to rebuild workplace structures based on a critical mass of union members and activists then the political choice between co-operative unionism and more aggressive oppositional union forms may constitute a false dichotomy. Whilst, on the face of it, these positions do seem to hold some merit, concrete evidence suggests that strategic decisions governing the form of union activity that should be developed at the workplace level will have considerable implications for the longer term viability of democratic trade unionism. By analysing patterns of union organising in workplaces that are mostly long-established we have found that union structures designed to support free collective bargaining, union autonomy and union challenges to management tend to be diminished by partnership-based union forms. If such structures are to be sustained in the longer term they require anchoring on democratic grassroots participation.

Both our initial quantitative survey data and later case studies of workplace union dynamics generated consistent patterns of results pointing to the greater worth of oppositional organising strategies. The survey data also showed, however, that workplace unions which followed either elements of the organising model or more co-operative approaches (such as partnership) both fared better than unions which had adopted neither. In other words, taking up a strategic position was better than doing nothing at all. In the latter case, the lack of union

strategy seemed to reflect moribund workplace organisational structures marked by diminished union activism, a consequent reliance on the servicing activity of full time officers, and relatively low union influence at the workplace. Equally, there existed a number of significant differences in performance between the groups of workplace unions that had adopted either the organising or the partnership approach. The 'organising' unions displayed better records of recruiting members and increasing workplace density. They displayed a greater degree of organisational strength measured in terms of member-representative ratios, the frequency of meetings of union activists and the frequency of meetings between union negotiators and management. As for union influence over pay and conditions, the organising unions tended to score higher when influence was measured on the basis of the range of workplace issues that were subject to negotiation rather than consultation. Thus, despite the argument that co-operative forms of unionism are more likely to generate meaningful employee voice and greater union influence (for example, Haynes and Allen, 2001; Oxenbridge and Brown, 2004), our data suggested that these predominantly early stage partnerships offered few such advantages.

When our initial survey research was first published in 2003, we suggested that these contrasting patterns were a function of the nature of union response to management strategy in the new workplace. By the latter we meant an array of organisational and cultural changes that have taken hold in many British workplaces, including the adoption of new management techniques and new work organisation. Those unions that were better able to critically engage with these management initiatives and construct oppositional, collective action frames around patterns of worker discontent were more likely than the relatively passive partnership unions to renew and revitalize their workplace union structures (see Danford et al., 2003). However, these arguments were necessarily tentative in that the survey work was completed during the early stages of the promotion of 'New Unionism' in the UK. Our later case study work afforded the opportunity of a more in-depth investigation of the process and dynamics of union strategy in three salient employment sectors of the South West economy.

The six case studies summarised in this paper provided specific examples of the degradation of employment conditions arising from new capital accumulation strategies and intensification of market relations in private sector firms and a transition towards the market with associated use of private sector management techniques in the public sector. In the aerospace plants, the labour process became subject to new systems of financial control and matrix management involving a rationalisation of production and cost-cutting labour 'efficiencies' in the form of labour flexibility, teamworking, outsourcing and employment of agency workers. In the finance sector workplaces similar trends could be discerned with the rationalisation of labour deployment into profit centre structures, call centre operations and customer-focused teams. The two public sector cases in local government and the NHS provided typical examples of the repercussions for labour of the privatising tendencies of New Labour's 'modernisation' project. In both cases, new measures of financial control involving the specific techniques of systemic auditing, performance monitoring, benchmarking, competitive tendering and outsourcing led variously to job-cutting, work intensification and patterns of workplace stress.

In these highly challenging contexts of organisational change, the adoption by unions of co-operative approaches to relations with management seemed, at best, irrelevant and at worst, highly damaging to the interests of labour. In many respects, the outcomes for unions and their members reflected Marx's (2007) prescient rejoinder to certain types of 'philanthropists' and 'socialists' who, in the middle of the nineteenth century, were calling for the elimination of union conflict and strikes:

> [I am convinced] that the alternative rise and fall of wages, and the continual conflicts between masters and men resulting therefrom, are, in the present organization of

industry, the indispensable means of holding up the spirit of the laboring classes, of combining them into one great association against the encroachments of the ruling class, and of preventing them from becoming apathetic, thoughtless, more or less well-fed instruments of production. (2007: 130-31).

Whilst the different union leaderships in our workplace case studies did not see themselves as entering into a coerced form of partnership (Martínez Lucio and Stuart, 2005) the expected qualitative shift in the nature of management-union relations inevitably drew on unitary action frames. In the absence of independent and oppositional union orientations these partnerships became dominated by the employers' interests and acted as instruments of legitimisation of management policy. In the case of aerospace and finance, the partnership unions failed, eventually, to secure any sense of independent 'employee voice'. For example, their ability to maintain some influence over the regulation of employment conditions became increasingly brittle whilst their co-operative orientations to management generated very little union impact on processes of organisational restructuring and job loss. At *FinanceCo*, the one example of non-union, partnership-based employee representation, core worker concerns such as the setting of pay and conditions were left entirely to managerial discretion and excluded from partnership consultation processes. In the local government and NHS cases, we found no evidence to support the hypothesis that public sector partnership agreements contained greater potential for generating mutual gain outcomes compared to the private sector (Bacon and Samuel, 2007). The tensions apparent in union co-operation with management agendas of quasi-privatisation and financial control were such that the relation of trust and accountability between member and union could not be sustained. At *CityCo*, the different workplace unions came to reject partnership following experimentation with a number of pilot projects. At *GHT*, the lack of union opposition to managerial processes that had engendered a considerable deterioration in the quality of working life on the wards caused, for many members, a process of alienation from the union to take hold. Indeed, in all of the partnership case studies, the distancing of senior union representatives from grassroots opinion became problematic.

The two examples of unions following the 'organising model' approach at *Airframes* and *JetCo* allowed direct comparisons with the contrasting partnership union groups in these plants. The dynamics of union organisation were in many respects distinctive in these cases, exemplifying Lévesque et al.'s (2005) argument that the process of building independent, democratic trade unions requires sustained attempts by activists too nurture rank and file participation and positions of worker solidarity. Union convenors regarded democratic accountability to the rank and file as paramount (a social bond that contravenes the alternative priorities of partnership). The overriding principle that governed their assessments of the contemporary role of unions at the workplace was mass membership involvement through systematic communication and debate - trade unionism was perceived primarily as an instrument of working class democracy rather than an intermediary in the regulation of the employment relationship. As a result, although these 'organising unions' experienced their fair share of defeats and setbacks, they retained the ability to mobilise rank and file opposition to managerial actions at critical points, for example, in response to job transfers. Member participation, a degree of job control and the placing of limits on managerial prerogatives constituted the distinctive outcomes of this union form.

The contrast in dynamics between the partnership and organising union forms reinforces the argument that, as Carter (2006: 422) has put it, 'the means of renewal affect the end'. It may well be the case, as Terry (2003) has argued, that unions which pursue partnership strategies may bolster their legitimacy at work and in wider society. But the problem for partnership is that legitimacy built on co-operative engagement with the employer may inevitably translate into illegitimacy in the eyes of the rank and file. We do not suggest, however, that 'rank and file' trade unionism constitutes the cardinal *modus operandi* for union renewal. As our

aerospace case studies suggested (see also Danford et al., 2007), the extant traditions of 'localism' in UK union relations are no longer sustainable in the face of global capital's increasing tendency to transfer jobs regionally, nationally and internationally through the use of plant relocation, outsourcing, employment agencies, and so on. This suggests that the more favourable concrete outcomes of union activity associated with an oppositional organising model may well be short-lived in the absence of a renewal of democratic processes and solidarity links beyond the confines of the single workplace. This may require a revitalization of a broad left-led political leadership within the labour movement along with the development of new spaces of union activity and co-ordination between union members, activists, officers, union bureaucracies and trades councils. Given the current paucity of such processes in the context of neo-liberal hegemony, establishing such a dynamic of union renewal remains a daunting challenge for organised labour.

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