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Union revitalization in the United Kingdom

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Acknowledgements

This Discussion Paper "Union revitalization in the United Kingdom" by Ed Heery, John Kelly and Jeremy Waddington, forms part of a special series of studies on the labour movement in industrialized countries. The other studies in the series are: "Reviving the American labour movement: Institutions and mobilization" by Richard Hurd, Ruth Milkman and Lowell Turner, and "Unions in Germany: Groping to regain the initiative" by Martin Behrens, Michael Fichter and Carola Frege. These studies were presented at an international seminar entitled "The Labour Movement: Opportunities and Strategies" held in Geneva on 19-21 April 2001. The seminar, organized by the International Institute for Labour Studies in collaboration with the ILO Bureau for Workers' Activities and Cornell University's Comparative Labour Revitalization Project Team marked the completion of an Institute project: "Organized Labour in the 21st Century" under the Labour and Society Programme. The seminar served as a forum to synthesize the findings from various studies on the labour movement prepared in both developed and developing countries by the Institute, the Workers' Activities Bureau and the Cornell Team, and to draw policy lessons for the movement in a global economy. The Institute wants to place on record its appreciation of the authors of the three studies for having authorized their publication as Discussion Papers.

1. Introduction

Since 1979 trade union membership in the United Kingdom has dropped from more than 13 million to less than 8 million, trade union density has declined from more than 50 per cent to 30 per cent, and the percentage of workers covered by collective bargaining has fallen from more than two-thirds to just over one-third (Hicks, 2000). This decline has had severe consequences for trade unions as institutions. They have lost power and influence over Government and employers, their legitimacy has been questioned as they have become less able to attract members and less representative of the working population, and diminished revenue has pushed many unions into financial crisis and retrenchment (Kessler and Bayliss, 1995; Undy et al., 1996). Decline has also had severe consequences for many workers. As union influence over the labour market has declined, income inequality has grown (Goodman et al., 1997; Machin, 1996), a rising proportion of workers find themselves in insecure employment (Heery and Salmon, 2000), and there has been an intensification of work (Green, 2001). Even where unions have retained an institutional presence, the Workplace Industrial Relations Survey series suggests that this is often a 'hollow shell' marked by declining density, representation, bargaining coverage and influence over management (Millward et al., 2000, pp.179-83; see also Brown et al., 1998).

Despite this grim picture there is evidence of union revitalization in the United Kingdom. The Government's annual Labour Force Survey (LFS) registered an increase in union membership of 105,000 in 1998-99 - the first increase since the LFS series began in 1998 (Hicks, 2000, p. 329). In the early 1990's only a minority of TUC (Trades Union Congress) unions increased their membership in any one year (an average of 26 per cent 1990-1995), but 52 per cent of TUC affiliates recorded a rise in membership in 1999. There has also been a sharp rise in the number of employers conceding recognition to trade unions. According to Gall (2000), between 80 and 100 recognition agreements were signed each year between 1995-98 and this jumped to 270 cases in 1999 with a further 130 cases in the first half of 2000. The composition of the union movement is also changing, albeit slowly, with women now comprising 40 per cent of total TUC membership compared with 29 per cent in 1979.

These signs of revival reflect the more benign context in which unions are operating. Unemployment has fallen during a period of sustained economic growth and is now at its lowest level for over 20 years (although it is still well above the prevailing levels of the period 1941-1979). The election of a Labour Government in 1997 has led to modest but significant changes in public policy. A statutory recognition (certification) procedure became effective in 2000 under the Employment Relations Act (1999) and the Government has also established the right to be represented in disciplinary and serious grievance disputes (Wood and Godard, 1999). The continuing elaboration of European social policy has also played a part, with its requirement for consultation with worker representatives on a growing range of employment issues. On the other hand, much of the Conservative anti-union legislation of 1980-1993 is still in place, in particular the restrictions on union organization and strikes, and the absence of any legal protection for solidarity, political and unofficial strikes. Finally most employers are now non-union and according to recent evidence 'are content to operate without any means of independent employee voice' (Cully et al., 1999, p. 109). These (and other environmental factors) need to be taken into account in our evaluation of the outcomes of different union strategies.

The main aim of this paper is to analyse the recent trends in union membership (and to a lesser extent in influence) by focusing on the strategies adopted by unions themselves. We look in turn at organizing, mergers, links with international bodies and with social movements, social partnership with employers and relations with Government.

Before turning to the strategies themselves, we briefly consider in principle how they might help unions recover membership and influence. *Union organizing* is relatively straightforward since the aim here is to increase the volume of resources devoted to the recruitment and organization of new members, thereby enhancing the union's labour market power. *Mergers* could assist revitalization by achieving economies of scale, thus reducing the cost of servicing membership. And in situations

of competitive unionism, mergers could reduce inter-union conflict and thereby increase union bargaining power vis-à-vis the employer. *International* links could provide information about multinational corporations that might assist in organizing and bargaining, and could also provide solidarity in times of dispute. Such links could also enhance unions' political power through the lobbying efforts of international union bodies at the European political level. Links with *social movements* could have a number of effects: they could help unions acquire power resources, such as access to key individuals within specific communities who could assist with organizing campaigns. Such links might also serve to broaden the range of interests and the agendas that unions seek to represent and thus broaden their appeal to poorly represented segments of the labour force (Hyman, 1997). *Partnership agreements* with employers could influence a number of the variables that are known to affect union membership (Barling et al., 1992; Clark, 2000). If they improve workers' terms and conditions of employment, they could increase perceptions of union instrumentality amongst non-union employees. Insofar as they embody a union desire to cooperate with employers, they may erode the negative idea that unions are associated with militancy and conflict (Cohen and Hurd, 1998). This in turn could reduce both employee and employer antagonism to unions. The significance of the employer is clear from the fact that union density is 53 per cent where the employer recognizes trade unions but is just 4 per cent where there is no recognition (Cully et al., 1999; Gallie, 1996). Finally, *relations with Government* rest on the union movement's political power, but in the absence of a formal 'political exchange' there are questions about the nature and efficacy of political power resources.

2. Organizing the unorganized

The TUC and individual unions have launched a series of recruitment initiatives since the mid-1980s but the extent and depth of the organizing effort, and the formal commitment to organizing, have increased appreciably since the mid-1990s (Waddington and Whitston, 1995, pp. 186-92). The TUC established an Organising Academy in 1998 to train specialist organizers (as part of its 'New Unionism' initiative) and more than a hundred trainees have graduated to date, with most finding organizing positions across the union movement. The first two cohorts (1998 and 1999) directly recruited around 7,500 employees during their year at the Academy and the campaigns in which they were involved helped to recruit a total of approximately 18,000 employees at an average of £77 per recruit (Heery et al., 2000b). Individual unions have also launched their own initiatives, though the scale of the organizing effort is less than that seen recently in the United States. A 1998 survey of more than 60 British unions indicated that, in the previous 3 years, between a quarter and a third had established a national organizing policy and an organizing budget, instituted organizing training for full-time officers and lay representatives, and created new specialist organizing roles (Heery et al., 2000c; see also Carter, 2000; Fiorito, 2001; Waddingtion and Kerr, 2000; Wills, 2000; Wood et al., 2000).

The TUC's Organising Academy has been strongly influenced by the 'organizing model' current in the United States and the training programme for organizers has been based around a conception of good practice that approximates to the 'union-building' approach identified by Bronfenbrenner (1997). Available evidence on organizing, however, indicates a high degree of variation in practice, even amongst union that have sponsored organizers at the TUC's Academy (Heery et al., 2000b). This variation is apparent across a number of dimensions, including the nature of the targets selected for organizing activity, the methods used and the identity of the organizers.

3. Organizing targets

As compulsory unionism is unlawful in the United Kingdom, 'organizing the unorganized' can include increasing membership at sites with union recognition as well as extending membership to unorganized workplaces. In-fill recruitment (or consolidation), where the union already has a presence, is probably the dominant approach to formal organizing and has been recommended by commentators such as Metcalf (1991) as the most cost-effective response to decline. There is evidence, however, of increasing union ambition in the targets selected and of a switch of union strategy towards 'greenfield' (or expansion) organizing . Amongst unions affiliated to the TUC's Organising Academy, GPMU (Graphical, Paper and Media Union) and ISTC (Iron and Steel Trades Confederation) have shown most commitment to organizing non-union sites but other unions, including AEEU (Amalgamated Engineering and Electrical Union), GMB (General, Municipal and Boilermakers Union) and TGWU (Transport and General Workers Union), have also adopted a policy of expansion.

If consolidation versus expansion defines one aspect of union targeting, then the similarity of target workers to existing members defines another (cf. Kelly and Heery, 1989). The evidence here points to a relatively conservative orientation amongst unions as they have mainly targeted workers in the proximate job territories. Thus, Gall (2000) notes that many of the new recognition deals are in the 'old economy' of the public sector and manufacturing. Data from 98 greenfield organizing campaigns collected by the New Unionism Research Group at Cardiff found a similar pattern. Ten per cent of campaigns were directed at public service and voluntary organizations, 52 per cent at manufacturing plants and only 38 per cent at private services, by far the largest component of the British economy. The same data indicated that only 10 per cent of campaigns were directed mainly at professional workers and only 3 per cent at managers; in more than half the focus of greenfield organizing was unskilled or semi-skilled manual workers.

Perhaps more encouraging is the increasing tendency for unions to target women, ethnic minorities and atypical workers, often via in-fill campaigns that seek to extend membership to previously neglected groups. The New Unionism Research Group has collected data from more than 150 organizing campaigns (greenfield and in-fill), mainly though not exclusively from organizers at the TUC's Academy. Across these campaigns women comprised a majority of the target group in 54 per cent of cases, ethnic minorities did so in 9 per cent, and part-timers were a majority in 19 per cent. In 70 per cent of campaigns temporary workers formed part of the union target. The need to prioritize the recruitment of women workers has been accepted for some time by most British unions (Howell, 1996) but there appears to be increasing recognition of a need to organize the 'flexible' labour force, whose characteristics depart from the norm of open-ended, full-time employment.

4. Organizing methods

Unions are also faced with a set of strategic choices with regard to the methods of organizing. One key distinction can be drawn between attempts to 'organize the employer', through an offer of union partnership or cooperation (see below), and 'bottom-up' organizing where the union establishes a body of membership and relies on collective organization as a basis for securing recognition. Both methods can be readily identified in the United Kingdom. The AEEU and USDAW (Union of Shop, Distributive and Allied Workers), in particular, have an established policy of extending recognition by appealing to employers; other unions, including the GMB, TGWU, UNIFI (banking and finance union) and UNISON (health and local government union) rely at least partly on this method. Moreover, where unions are practising in-fill recruitment it is the norm in the United Kingdom for them to seek and obtain employer cooperation. Some unions,

however, such as the ISTC, eschew contact with the employer until majority membership is established and in a very high proportion of campaigns (both greeNfield and in-fill), organizing is 'adversarial' in the sense that it is based on the identification and exploitation of grievances (cf. Kelly, 1998). According to the Cardiff survey, 90 per cent of campaigns are grievance-based, with relatively traditional union issues such as health and safety, workplace discipline and management style, featuring most prominently. It seems that the basic protective function of unions as regulators of management authority within the workplace continues to provide a basis for unionization (cf. Waddington and Whitston, 1997).

A second distinction relates to union-worker relations and embraces approaches based on 'organizing' and on 'servicing' (cf. Boxall and Haynes, 1997; Waddingtion and Kerr, 2000). With the first approach membership is built around collective organization and organizing activity extends beyond recruitment to embrace the identification and grooming of activists and the involvement of workers themselves in the process of organization. With the second approach, in contrast, the recruitment of workers is the major objective and may be conducted through the offer of union representation, consumer services, and labour market services to individuals. Again, there is evidence that both methods are applied in the United Kingdom. Recruitment through the offer of union services, for instance, is an established tradition in unions of professionals, managers and freelancers, several of which have expanded services in recent years to provide support for training, career development, and job search (Heery et al., 2000a). A significant minority of trainees at the TUC's Organising Academy complain that their sponsoring union prioritizes 'recruitment' not 'organizing' (Heery et al., 2000b). Despite this complaint the accounts provided by trainees indicate widespread use of an organizing approach. Thus, a reported objective in 86 per cent of campaigns is to identify new activists, in 70 per cent the aim is to establish a workplace committee or branch, and in 88 per cent it is to encourage workplace representatives to recruit more actively. These objectives appear to have been realized in a high proportion of cases. According to the organizers, 77 per cent of campaigns did identify new activists, just over half led to the setting up of a union branch and in 60 per cent of cases an organizing committee or team was established amongst the target workforce. These data suggest that a 'union-building' approach is fairly widespread in the United Kingdom, although it co-exists with a servicing approach. A likely reason is that the 'organizing model' conforms to elements within an indigenous union tradition, which has long relied upon and sought to promote active workplace trade unionism (Kelly and Heery, 1994, pp. 111-119).

A third dimension of union organizing is its degree of formality or deliberate management. Evidence from the 1980s indicates that much union organizing was reactive, ad hoc and unsystematic (Kelly and Heery, 1994, pp. 101-123). A distinctive feature of the current phase, however, has been the attempt to import a greater degree of planning and direction into organizing activity. This can be seen at three levels. At the TUC a New Unionism Task Group has been established to devise, promote, and review organizing policy for the movement as a whole (Heery, 1998a). At the level of individual unions there has been the development of formal organizing policies, which in several cases seek to apply performance management and organizational development techniques to t he union's constituent regions, divisions and branches (Heery et al., 2000c). In the case of UNISON, the core element of this effort is the requirement for all branches to institute and review their own branch development plan incorporating annual recruitment and organizing objectives (Waddington and Kerr, 2000). At the level of the individual organizing campaign, formalization can be seen in the spread of specialist organizing techniques. According to the Cardiff survey, 85 per cent of campaigns rely on person-to-person recruitment, or 'one-to-ones', just under half have applied mapping techniques, 44 per cent have used actions to raise the union profile, and 60 per cent have been guided by recruitment targets. More ambitious techniques have been used in a minority of campaigns, including house calls (15 per cent), corporate

campaigning (12 per cent) and media coverage (26 per cent). It would be wrong to exaggerate the extent or effectiveness of systematic organizing and there are as yet few cases of British unions running 'strategic campaigns' targeted at pivotal companies. Compared to the recent past, however, organizing has itself become more 'organized'.

5. Union organizers

There are some examples of grassroots organizing initiated by local activists, such as the Battersea and Wandsworth 'Join the Union' campaign in London (Wills, 2000). Most recent organizing activity, however, even where it has been directed at stimulating local activism, has originated in formal campaigns set in train by paid union officers, a characteristic that is shared with much recent organizing in the United States (Voss and Sherman, 2000). Also shared with the United States has been the role of the central trade union confederation in stimulating organizing. Before the creation of the Academy, the TUC had little direct involvement in organizing, but since then it has been able to influence the recruitment and selection of union organizers and to diffuse knowledge of the US 'organizing model'. There are limits to its influence, however, and after the first year of the Academy the larger unions, with the exception of UNISON, have remained aloof. Nevertheless, a total of 17 affiliates (22 per cent) have sponsored organizers and through the programme the TUC has established a new distinctive competence (Heery et al., 2000b).

A watchword of the Academy has been 'organizing is about organizers', which means that special skills are required and that effective organizing requires the deployment of specialists. Specialization of this kind has not been a marked feature of British trade unionism, which has tended to rely on generalist full-time officers and lay representatives. A particularly striking feature of recent development has been a break with this legacy, partly, though not exclusively, under the influence of the Organising Academy. More unions are now employing specialist organizers and have developed specialist lay organizer roles (Heery et al., 2000b; 2000c). A development which seems particularly significant has been the establishment of specialist organizing teams or units in a series of unions including Connect (a communications managers' union), GMB, GPMU, IPMS (Institution of Professional, Managers and Specialists), ISTC, and TSSA (Transport Salaried Staffs Association). These units appear to have functioned as centres of innovation and to have prevented organizing initiatives being derailed through the demand for servicing of existing members. Organizers in specialist units are more likely to report the use of systematic techniques and a range of activities that approximate to the 'organizing model' (Heery et al., 2000b). They seem to have functioned as mechanisms for the internal diffusion of organizing practice.

A final aspect of recent organizing has been an attempt to alter the profile of union officers and representatives in order to promote organizing. Partly this has arisen from a conviction that 'like recruits like' and a belief that organizing new groups of workers requires organizers with matching characteristics. Partly, too, it arises from a desire to infuse unions with new blood and experience of methods and techniques used in social movements other than organized labour (Heery et al., 2000b; cf. Voss and Sherman, 2000). The Academy has substantially met these objectives and its organizers have been mostly female, younger and better educated than is usual for union full-time officers. There is also evidence of a commitment to changing the profile of union workplace representatives. The Cardiff survey of campaigns found that in a quarter of cases a 'very important' objective was to increase representation amongst women and young workers, and in 18 per cent increasing ethnic minority representation was a prime objective. These objectives are apparently being met in a substantial proportion of cases. In more than half the campaigns organizers reported success in strengthening women's representation, in a third they reported strengthening young worker representation and in 16 per cent they reported strengthening ethnic minority representation.

Although the situation is complex in the United Kingdom, there is evidence of a greater ambition in the selection of organizing targets, the spread of more systematic organizing informed by the 'organizing model', and the emergence of specialist roles. There is also evidence of unions seeking to accommodate workforce diversity in their organizing activity (cf. Yates, 2000). These changes may fall short of a fully developed 'organizing culture' but they are not trivial, and they correlate with improvements in aggregate union membership and recognition. Why has there been a growth of union activity? The answer seemingly has to do with the incentives and opportunities facing British labour and internal conditions that have allowed for learning from overseas and the diffusion of organizing knowledge.

6. Incentives and opportunities for organizing

Union decline has provided an acute incentive for greater commitment to organizing and the display of 'scary graphs', showing projections in union membership, finances and employment has formed part of the change process in several British unions. It is not simply membership decline that has pushed the unions towards organizing, however, other factors have also provided an incentive. For the TUC commitment to organizing emerged before the return of Labour to office when its influence over the domestic political process was minimal. Denied access to other resources and fields of activity the TUC turned to internal renewal as a response to political exclusion (Heery, 1998a). According to some critics, its commitment to organizing has waned as other channels of influence have been restored in the wake of Labour's return. For individual unions a parallel incentive existed in the collapse of institutional arrangements for union security in a series of industries during the Thatcherite assault on organized labour. Thus, the print, media and entertainment unions were forced to develop new organizing policies to replace the closed shop, and in the privatized utilities unions had to develop more effective organization to offset reduced levels of employer support. At the same time, the continuing devolution of bargaining in the British economy provided an incentive, particularly for unions in the public services, to develop more effective organization at enterprise level. In a decentralized system, bargaining power is dependent on local concentrations of membership and of necessity requires relatively effective workplace organization, particularly in the United Kingdom where union subscriptions, and hence officer resources, are low. Each of these incentives has encouraged unions not just to recruit but also to develop collective organization. Internal revitalization has been necessary to compensate for diminished external support. A series of environmental incentives, therefore, has encouraged British unions to experiment with the 'organizing model' or a 'union-building' approach.

Overlaying these incentives has been a series of opportunities to develop recruitment and organizing activity. Perhaps the most significant has been a change in the law and the introduction of the statutory rights to recognition and representation under the Employment Relations Act (1999). The TUC and several of its affiliates have tried to exploit the new laws (Wood et al., 2000), partly from a belief that there may be only a limited window of opportunity before employers develop effective resistance. The rising trend in recognition agreements shows clearly that the new law has elicited an increased union organizing effort. It has also provided an incentive for employers to seek voluntary recognition as a pre-emptive measure to ensure that recognition is not imposed through a legal procedure and that it causes minimum disruption to the enterprise. This means that in many cases British unions have pushed against an open door (this may diminish over time as receptive targets become harder to find) and have not needed sophisticated or 'union-building' approaches to win recognition. The resulting agreements may be weak but the receptiveness of at least a proportion of British employers to recognition means that deals can, and have been, won without recourse to the kind of organizing methods that are required in the United States. Moreover, the decline in density in organized workplaces means there is ample scope for most unions to increase membership

in a relatively benign environment that, once again, does not necessarily require an intense union-building effort. According to the organizers surveyed by the New Unionism project one of the most effective methods of recruitment is having employer-sanctioned union input into the formal induction process for new employees. The opportunities available to unions, therefore, to some extent cut across the incentives to use the 'organizing model', and help explain the complex pattern of recruiting and organizing that is apparent.

Given the complex mix of incentives and opportunities which face British unions, there is arguably scope for strategic choice in the pattern of response. It is possible to identify particular organizing profiles across the labour movement, with different unions developing different approaches depending on their tradition and ideology (Heery et al., 2000b). In cases such as USDAW there is emphasis on securing employer support for union membership and relying on travelling recruitment officers to build membership, with a consequent downgrading of the organizing theme. In unions like GPMU and ISTC, in constrast, there is strong emphasis on building workplace organization and commitment to developing membership even where the employer is hostile. To an extent these differences reflect differing union traditions. Both the GPMU and ISTC, however, have consciously sought to innovate and apply American organizing techniques to the British context. They have sent organizers abroad to learn techniques and have established specialist units to promote greenfield organizing. In both unions, moreover, these initiatives have depended on leadership change and the arrival in office of key change agents, in the case of ISTC, from outside the union (cf. Voss and Sherman, 2000). Change has also occurred in USDAW, in the sense of greater investment in recruitment, but within an established union tradition. Innovation in organizing strategy appears to require both leadership change and receptiveness to learning new methods from outside. It may also require specialization in order to protect innovation, at least in its early stages, from derailment or distraction.

7. Constraints on organizing

While there is evidence of increased union organizing in the United Kingdom, it would be wrong to exaggerate the extent of change or minimize the internal and external constraints on organizing with which unions must contend. Internal resistance to organizing has in some cases been strong and has arisen from a number of sources. Existing members and activists have been apathetic or have even actively opposed organizing because it involves the reallocation of union resources. Union officers have offered resistance on occasion because organizing adds to their workload or because their skills and priorities lie in servicing existing members (Carter, 2000; Heery et al., 2000b). There has also been tension between meeting the short-term need to raise membership and subscription income and the longer-term goal of establishing sustainable workplace organization. Certain structural features of unionism in the United Kingdom have compounded these problems. Unions are poorly resourced and, despite recent reform, often lack managerial skills and effective information systems. Many are loosely structured, with fairly autonomous branches, and function as relatively closed systems with officers and leaders recruited from the ranks of senior activists (Kelly and Heery, 1994, pp. 53-60). A preference for relying on internal labour markets has restricted the number of unions joining the Organising Academy and arguably makes the diffusion of innovation and effective inter-organizational learning more difficult. Even where non-traditional organizers have been hired, they have often found it difficult to integrate with their unions; younger and female organizers, in particular, have reported harassment from officers and lay representatives (cf. Pocock, 1998). While a discernible organizing current has emerged amongst senior union leaders, local officers and activists, there is an opposing tide of scepticism and opposition.

There are also external constraints on organizing. First, and notwithstanding the new right of representation, British unions have difficulty gaining access to unorganized worksites and the legal framework is not supportive of organizing in this sense. Second, the recent pulse of organizing activity has generated inter-union competition, which in turn is a function of the structure of the British labour movement and the dominance of open or general trade unions (see below on mergers).

This allows employers to play unions off against each other and so reinforces the pressure for an employer-focused organizing strategy. Third, and in partial qualification of what was written above about employer receptiveness to recognition, there is evidence of sometimes sharp management resistance. According to the Cardiff survey, in nearly two-thirds of greenfield campaigns the employer denied access to the worksite; in about a quarter of cases a management consultant was called in to advise on anti-union tactics; in more than half the cases a non-union channel of communication was established or strengthened; and in 40 per cent of campaigns there was victimization of union activists. Contrary to the claim of some theorists (e.g. Adams, 1995), there has not been a uniformly hostile response to organizing on the part of British employers, and evidence of the sophisticated anti-union tactics seen in the Untied States is at present limited. Nevertheless, the resistance of a proportion of British employers to unionization cannot and should not be neglected and in the United Kingdom, as elsewhere, the process of creating a union can require courage, dedication and acceptance of risk.

8. The merger process

The union structure in the United Kingdom is notoriously complex. Throughout the twentieth century no single structural form of union organization was predominant. Overlapping recruitment bases, a large number of unions that adhere to a variety of principles of organization, and diversity in the origin of unions all contribute to this structural complexity. Structural reform with the objective of a more 'logical' or 'simple' structure has been on the agenda of British unions for more than a century. Trade union mergers have been the principle means of structural reform. Rather than simplifying trade union structure in the United Kingdom, however, mergers have added to its complexity in that they have crossed industrial, occupational and political lines of demarcation between unions.

More recently, debate has shifted to the formation of 'super-unions', a limited number of which, it is suggested, may soon dominate trade unionism in the United Kingdom (William and Cave, 1994). It is predicted that membership will become more concentrated in relatively few super-unions, each of which will operate with a recruitment base unrestricted by industry or occupation. If the transformation to super-unions is to move ahead, mergers will be the principal means of structural reform. Similarly, integral to the *Millennial Challenge* proposal of the Trades Union Congress, launched in 1999, is the objective of a 'more logical' trade union structure though which solidarity can be better promoted (TUC, 1999). If this millennial challenge is taken up by unions affiliated to the TUC, a further extensive range of mergers can be expected. Thus, mergers have been, and continue to be, central to trade union structural reform in the United Kingdom.

This section indentifies the scale and pattern of occurrence of the merger process, together with the influences that promote it. It argues that mergers are a defensive response to adverse environmental circumstances and have failed to provide the organizational platform from which recruitment footholds in private sector services can be secured. Several features distinguish the merger process among British trade unions:

- in the context of a comparative study, the sheer scale of merger activity in the United Kingdom is a distinguishing feature;

- mergers have not markedly 'simplified' the complex structure of trade unionism, but have consolidated a trend towards increasing membership heterogeneity among the larger unions;

- issues of internal union representation have become increasingly complex as unionists have introduced systems of representation designed to maintain union cohesion in the face of more diverse membership (for details, see next section);

- mergers in the United Kingdom have been legally regulated since 1876. The current legislation allows merger by means of amalgamation or transfer of engagements.[1]

9. The scale of the merger process

Between 1950 and 1998 there were 441 mergers in which 522 unions and 3,870,570 members were absorbed.[2] A total of 67 unions were formed by mergers in the same period. Although the fall in the number of unions from 691 in 1950 to 260 in 1998 was influenced by the merger process, the impact of union formation and dissolution was also significant.[3] Between 1950 and the mid-1960s merger activity was relatively sparse, but after the mid-1960s the number of mergers, unions absorbed, members absorbed and number of unions formed by merger increased, and remained relatively high (Waddington, 1995).

The peak in merger activity after the mid-1960s is not the sole result of declining membership. Between the mid-1960s and 1979 aggregate membership rose in the United Kingdom, followed by the longest period of annual membership decline on record, between 1980 and 1998. In other words, the peak of merger activity after the mid-1960s coincided with periods of both membership growth and membership decline. After 1950 unions that organized less than 5,000 members comprised about 80 per cent of those involved in the merger process. The pattern of involvement of unions larger than 25,000 members differs before and after 1979. Only seven unions with 25,000 or more members were absorbed before 1979, whereas between 1980 and 1998 no fewer than 22 unions of this size were absorbed, including eight which organized more than 100,000 members. Larger unions were thus unable to mitigate the effects of membership decline after 1980 and were more likely to be involved in the merger process as absorbed unions.

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[1] The legislation on mergers includes the Trade Union (Amendment) Act 1987, the Trade Union (Amalgamation) Act 1917, the Societies (Miscellaneous Provisions) Act 1940 and Trade Union (Amalgamation) Act 1964. Each successive legislative measure has eased the requirements for merger. The current legislation allows merger by two procedures: amalgamations, involving two or more unions in which the memberships fo all unions involved in the merger proposal must vote, and transfer of engagements, which requires a vote among only one of the unions involved. In both cases a simple majority of those voting must vote in favour of the proposal if it is to go ahead.

[2] For out purposes mergers are regarded as comprising acquisitions (where one union acquires another in a merger) and an amalgamation (where two or more unions combine to form a new union). The calculation of the number of unions and number of members absorbed is different for the two forms of merger. For an acquisition, one union is absorbed and the membership of that union is the membership absorbed. For an amalgamation the largest union involved is treated as the acquiring union. The number of unions absorbed is thus the number of unions involved in the amalgamation minus one, whereas the number of members absorbed is the total of members involved in the amalgamation minus those of the largest union.

[3] A formation involves the establishment of a new union from scratch rather than from two or more extent organizations. The number of union formations rose throughout the 1960s, remained relatively high during the 1970s before falling sharply during the 1980s and 1990s. A dissolution occurs when a union ceases to exist. During the late 1970s and early 1980s the number of union dissolutions rose thus accelerating the rate at which the total number of unions fell.

10. What factors underpin the merger process?

The merger process has been promoted by a range of factors, which include financial weakness, changes in the structure of bargaining and the implementation of merger policies within trade unions. These factors are not mutually exclusive.

Trade union finances. Although membership grew by 2.62 million members between 1965 and 1980 the aggregate financial position of unions deteriorated markedly. Contribution income per member and total income were both 6.9 times greater in 1980 than in 1965. However, total expenditure increased 7.7 times in the same period and expenditure on administration 9.5 times. In other words, growth in expenditure outstripped growth in income by some margin. Income from members, however, continued to exceed administrative expenditure by more than 20 per cent and total income exceeded total expenditure by about 15 per cent.

The impact on union finances of the decline in membership after 1979 was profound. Administrative expenditure as a proportion of total expenditure rose from 62.8 per cent in 1965 to 77.4 per cent in 1980 and to 87.9 per cent in 1998. Income from members was less than expenditure on administration from 1988 onwards. Trade unions were thus unable to service their existing membership from the contribution income received throughout the 1990s. Furthermore, lax financial controls within some unions led to inadequate measures to combat rising costs and thus compounded their effects (Willman et al., 1993). Financial weakness arising from membership decline was thus a widespread influence on the merger process.

The structure of bargaining. The structure and practice of collective bargaining has altered significantly since the mid-1960s. These developments have influenced the pattern of union expenditure and impinged on the merger process in three specific respects. First, after the report of the Donovan Commission in 1968 a series of measures was introduced to strengthen the procedural aspects of industrial relations. These encouraged an increase in the number of shop stewards with commensurate rises in the cost of trade union education and training. A significant proportion of this cost was initially borne by the state, thus protecting the larger unions from sharp increases in expenses. Smaller unions were, however, unable to provide the required training and education, and merged. The state funding of shop steward training was phased out under the terms of the Trade Union Reform and Employment Rights Act 1993, which exposed the larger unions to increased costs.

Second, a larger number of unions established support departments to handle the rising demand for research, legal, health and safety, and equality advice and information. This was particularly the case during the 1960s and 1970s when the dilute forms of corporatism that characterized industrial relations in the United Kingdom required senior officers to be briefed on a wide range of policy matters. Administrative costs rose as unions attempted to perform this role.

Third, since the mid-1970s employers in the United Kingdom have tended to promote the decentralization of bargaining. Decentralization placed rising demands on the union support function, as larger numbers of collective agreements were required to cover a declining number of members. Administrative costs rose as trade unions attempted to meet these additional demands on their diminishing resources. The dencentralization of bargaining may also have encouraged mergers insofar as it brought together lay representatives from different unions and compelled them to negotiate with employers at the workplace. 'Working together' in this fashion may have broken down some of the barriers to mergers among lay activists.

The impact of union policy. Throughout the post-war period the TUC encouraged mergers among affiliated unions and provided mediators to facilitate merger negotiations. Mergers were seen as a means to reduce sectionalism, demarcation disputes and inter-union competition for members. The decline in the number of unions affiliated to the TUC, from 186 in 1950 to 76 in 2000, almost

entirely resulted from mergers.[4] Before 1962 reviews of trade unions structure by the TUC advocated industrial unionism as the preferred principle of organization. The review of union structure conducted in 1963 and the later *Millennial Challenge* (1999), in contrast, are more circumspect towards any specific form of union organization. Instead, these documents emphasize the capacity of larger unions to provide superior services to members and to act more effectively at national level (TUC, 1963, pp. 162-163).

The direct effect of the TUC on the merger process is marginal. For example, a series of consultative conferences was convened in conjunction with the structural review of 1963. Few of the 18 specific recommendations arising from these conferences were implemented by affiliated unions (TUC, 1966, pp. 115-121). Almost 40 years later only two of these recommendations had been acted on in full, although several mergers that constituted moves towards the objectives identified by the TUC had also been completed. It remains to be seen whether the *Millennial Challenge* provokes a more widespread and positive response among affiliated unions. There is no evidence as yet to suggest that this initiative will result in more widespread reform.

The final decision on mergers has always rested with individual trade unions. Blueprints for structural reform established by the TUC have been undermined by the merger activity of affiliated unions, which tends to be driven by the needs of the individual unions rather than some overarching scheme of structural reform. TUC proposals foresee more mergers between unions with members in similar trades, occupations or industries. Smaller unions, for example, will often select a merger partner from among several unions that submit a bid. Similarly, traditional antipathy between officers or members, a similarity in political outlook among officers or a desire to retain a greater degree of post-merger autonomy are all factors that have resulted in mergers that follow no obvious occupational or industrial ‘logic', but meet the immediate requirements of the parties to the merger. Only among unions in the printing industry and in the civil service has there been a merger process with a clear ‘industrial logic', which has ‘simplified' the structure of trade union organization. More common are mergers -–such as that between the Iron and Steel Trades Confederation and the National League for the Blind and Disabled – which have no ‘logic' whatsoever, but are completed around the most favourable set of merger terms available to the union that is most in need of the merger.

11. Internal representation and union restructuring

Engagement in the merger process has required the development of more complex forms of union government and administration that allow for degrees of autonomy in post-merger unions. Mergers have also often provided an opportunity for the implementation of major internal reform. These tendencies have been exacerbated by increasing membership heterogeneity, arising from developments in the labour market. As a result, the members of many unions have become more heterogeneous, although fewer in number, over the last 20 years. Two aspects of these developments are examined here: the growth of internal structures that allow bargaining autonomy, and systems of representation intended to encourage participation among underrepresented groups of members.

[4] This decline would have been even greater had the TUC not embarked on a policy of attracting unaffiliated unions into membership during this period. Between 1995 and 1999 for example no fewer than 15 unions affiliated to the TUC for the first time. Only one union - the tiny Association of Beamers, Twisters and drawers - left the TUC and that was because it meagre resources no longer permitted affective participation in TUC affairs.

Systems of internal union representation that foster bargaining autonomy have been a characteristic of British trade union organization throughout most of the twentieth century. The formation of the Transport and General Workers Union in 1922, for example, resulted in the establishment of six trade groups, each of which bargained separately for distinct sections of the membership.[5] With the intensification of the merger process after the mid-1960s, the number of forms of sectional representation and the number of unions offering such provisions increased sharply (Undy et al., 1981; Waddington, 1995). The acceptance of some form of post-merger sectional autonomy by acquiring unions made them more 'attractive' as merger partners, as it enabled acquired unions to retain some degree of independence after the merger. Most of the larger British unions now function on the basis of a range of internal sections.[6] Only the larger unions with recruitment bases confined to a single occupation – such as doctors, nurses or teachers – lack forms of sectional representation. In the context of the m-erger process, however, the extent of any autonomy is restricted to the bargaining agenda. The terms of merger agreements ensure that financial control and decisions concerning industrial action are centralized and rest with the executive of the post-merger union. In the very few cases where such centralization has been excluded from merger agreements, the mergers have subsequently broken down.[7]

Internal union reform during recent years has also been directed towards developing institutions through which the participation in union affairs of traditionally underrepresented groups of members may be promoted. Many unions have now introduced representative structures specifically for women, young workers and members from ethnic minorities. Such measures have assisted in the articulation of members' interests within branch and wider union organizations (Munro, 1999). The engagement of women in workplace learning initiatives also offers the potential for new forms of workplace participation with higher rates of participation among women. UNISON has introduced a particularly wide-ranging series of constitutional devices, designed to retain cohesion among a diverse membership. The constitution of the union incorporates representation on the basis of occupation, pay-bargaining group, gender and status group. Also integral to the constitution is the principle of proportionality in the composition of committees, conferences, delegations and meetings.

Significant issues still need to be addressed before such arrangements generate member participation at the intended levels. For example, separate structures have been associated with the marginalization of issues of importance to the groups represented therein (Cunnison and Stageman, 1995); they have proved inadequate to prevent the items they generate for bargaining agendas being among the first to be dropped during negotiations (Colling and Dickens, 1998); and are not associated with a marked increase in the number of people from these groups assuming senior positions within trade unions (Garcia et al., n.d.) Furthermore, women are more likely than men to cite shortcomings in union organization as a reason for leaving the union (Waddington and Kerr, 1999). In short, considerable progress is required before issues of concern to these groups are mainstreamed within union organization and activity.

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[5] The formation of the TGWU resulted in the establishment of separate trade groups for Dock Workers, Waterway Workers, Administrative, Clerical and Supervisory Workers, Passenger Service Workers, Commercial Road Service Workers and General Workers.

[6] For example the number of trade groups within the TGWU has risen to 14 as a result of the acquisition of other unions since 1922. UNISON, the largest union affiliated to the TUC, operates with six service groups and the GMB is organized into eight sections.

[7] Probably the best example of a merger breaking down because of an absence of financial centralization was that between the National Society of Operative Printers and Assistants (NATSOPA) and the National Union of Printing, Bookbinding and Paper Workers (NUPBPW). After the failure of the initial merger, a second merger was completed with centralization of financial control and of decisions concerning industrial action.

The development of these increasingly complex forms of internal representation has raised questions of internal union articulation and coordination. In particular, different groups of members often have very little interchange within their unions, often maintaining 'parallel' organizations. Mergers and the development of more complex forms of internal union representation have thus transformed matters of traditional inter-union relations into matters of intra-union relations with no obvious benefits in terms of strategic advantage. A further limitation of such arrangements is that they often consume significant resources and, no doubt, have contributed to the rising administrative costs noted earlier. Clearly, the advantage of such arrangements is that they demonstrate that unions can implement structures and procedures whereby the voice of underrepresented groups may be heard. The point remains, however, that the interests of underrepresented groups have yet to be mainstreamed through the establishment of such structures and procedures.

12. International policies

The TUC invited Jacques Delors, then President of the European Commission, to address its Congress in 1988. This speech marked a sea change in the policies of British trade unions towards the European Union. From opposition, trade unions moved to support the broad thrust of the European agenda and, in particular, the regulatory regime envisaged within European social policy. This shift in policy remains central to the pattern of international solidarities under development within British trade unions. The extent of the shift was illustrated when the TUC became the first major British institution to come out in support of British entry to the European single currency.

The overwhelming majority of the contacts between British unions and their European counterparts result from engagement in the formal institutions associated with the European Union, such as the European Industry Federations (EIF), European Trade Union Confederation (ETUC) and the European Works Councils. The ambitious programmes of coordinated bargaining proposed at the Helsinki Congress of the ETUC, which are to be implemented by the EIFs, tend to exclude British unions at this juncture as unions from countries where industry bargaining remains in place are setting the pace (Gollbach and Schulten, 2000). Within companies, British trade union participation in EWCs is as extensive as the regulations permit. It is too early to predict whether such involvement will result in new forms of solidarity between unions, although participation does allow representatives to gain experience and familiarity with industrial relations practices and trade unions in other countries.

Although AEEU General Secretary Sir Ken Jackson claims that mergers between unions from different countries of the European Union are likely in the short term, there is little evidence to support his optimism. Direct links between individual British trade unions and their European counterparts remain sparse. Several unions have held joint seminars with European trade unions as a means of generating an understanding of different policy approaches and of developing personal relationships. Rarely, however, have these developed into more formal arrangements. An exception is the agreement between the GMB and *Industriegewerkschaft Bergbau, Chemie und Energie* (IGBCE), which ensures that GMB members employed in Germany will be represented by the IGBCE and *vice versa.* Where there is overlap between the membership of the two unions, particularly in the chemical industry, this agreement may prove useful to the relatively few members of both unions working in Germany or in the United Kingdom. For the remainder of the membership, however, the benefits of the agreement are not so obvious. If engineers organized by the GMB are employed in Germany, for example, it seems highly unlikely that IGBCE will be allowed to represent them by *Industriegewerkschaft Metall* (IGM), the dominant union in the German engineering industry.

13. Trade unions and social movements

Trade unions can relate to other social movements and campaigning organizations in three main ways. First, they can seek to use these movements as a resource, typically by entering into an alliance or joint campaign that will allow organized labour to meet a strategic objective. Second, unions can expand their objectives to embrace social and non-work issues so that they come to share the aims and purposes of movements that are concerned primarily with questions of race, community, gender, sexuality and environment. Third, unions can seek to learn from social movements and transpose their methods of organization, discourse and campaigning to organized labour.

Evidence of all three kinds of initiative can readily be found in the British labour movement, despite the fact that labour's relationship with other social movements has not been particularly close or extensively developed in this country. Examples of unions seeking to ally with other institutions to secure their traditional objectives can be seen in campaigns run in the 1980s to counter the privatization of utilities and the contracting out of local authority and other public services (Foster and Scott, 1998; Ogden, 1991). In these cases, unions sought an alliance with a broad range of consumer, community, amenity and environmental groups in largely unsuccessful attempts to moderate the restructuring of public services and protect the jobs and incomes of their members. At the apex of the trade union movement the TUC has engaged in similar activity, seeking to draw a broad range of movements and institutions into a progressive alliance to secure reforms to pensions and the legal entitlements of part-time workers (Heery, 1998a; 1998b). The TUC's initiative occurred during the period of Conservative rule when trade unions were largely excluded from political influence. This suggests that unions will turn to alliances with social movements to secure traditional objectives when other resources of power are denied them. There is a sense of unions seeking to identify new allies in a context of labour exclusion and it seems that traditional forms of political intervention, based on funding the Labour Party and access to government ministries, have reasserted themselves since Labour's electoral victory in 1997 (McIlroy, 1998). The incentive for allying with social movements has, in certain respects diminished, as the political cycle has turned.[8]

The second way in which unions can develop a relationship with social movements is by sharing their objectives. This might occur where trade unions seek to represent interests that are grounded in social identities which are ‘work-mediated' but which extend beyond the employment relationship. The TUC has actively sought to campaign on race discrimination in recent years and this has led it almost inevitably to develop joint initiatives with ethnic minority organizations. By the same token, it has developed policy on sexuality at work and launched an annual Pride March in conjunction with organizations of gays and lesbians. Finally, the agenda of family-friendly working practices and work-life balance, that has come to the fore in recent years, has stimulated joint action with a range of other movements and campaigning organizations. This agenda raises the question of the link between the employment contract and the broader ‘sexual contract' within society at large (cf. Wajcman, 2000) and, as such, has tentatively linked trade union concerns with those of campaigners on family, sex equality and social issues.

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[8] However the situation is complex and scope for alliance building remains. The election of a left-wing administration to the new government of London has provided and opportunity for community groups and the trade union left to mount a ‘Living Wage’ campaign in the East End of London. With a seemingly receptive local government to target, an alliance has been formed to press for contract compliance measures to raise the wages of public service contract workers. It should be noted, however, that this initiative has developed independently of the national leadership of British trade unionism.

This second type of link between unions and social movements may prove more enduring and less vulnerable to short-run change in the political environment. To the extent that unions are under long-term pressure to accommodate and represent diversity, then the need for contact and alliance with groups that express diverse interests will continue. Indeed, these groups may become increasingly active within unions themselves through the principle of self-organization within systems of union government (see above). The constraint on this development arises from the internal sources of opposition to equality and associated innovations in union policy (cf. Colling and Dickens, 2001). Problems may also arise from the fragmented structure of collective bargaining and union representation in the United Kingdom. According to Terry (2000), devolved bargaining reinforces a conservative, short-term and economistic bargaining agenda and so hinders the formation of long-term alliances with other progressive movements.

The third way in which unions have developed a relationship with social movements is through mimesis; that is, through attempts to import the methods and style of newer campaigning organizations into the labour movement. This has been seen in the field of union organizing, where in the United States and also, more recently in the United Kingdom, there has been an attempt to employ organizers with experience of social movements (cf. Heery et al., 2000b; Voss and Sherman, 2000). Another and perhaps more subtle change can be seen in the impact of the women's movement on aspects of trade union activity. For example, the TUC's campaign on part-time work in the mid-1990s has been described as follows:

> A final source of the campaign was the women's movement and the organisational principles associated with feminism. Thus, certain aspects of the campaign [were] marked by a deliberate informality…When the campaign was discussed at the TUC's Women's Conference this was deliberately done in an open and unstructured way without a formal motion; while…there was an emphasis on connecting with part-time workers in the workplace and the community and eliciting their voice through hot-lines and letters. The campaign laid great store by personal testimony, another feature of the women's movement, and a report, *Misery from the Margins,* was produced…which contained direct accounts of part-time working. Informality also characterised the internal working of the Task Group, which deliberately sought to collapse the status distinction between General Council members and TUC officers and secure open involvement from staff from different TUC departments. (Heery, 1998a, p. 359).

Change of this kind also seems set to continue though it would be wrong to underestimate the difficulties encountered in changing union culture. The relatively closed nature of unions as organizations has been referred to above and for unions of manual workers in particular the ethos of social movements can prove threatening.

There is a developing relationship between trade unions and social movements in the United Kingdom, therefore, which has been driven by political exclusion under the Conservatives and the need to identify new resources of power; by the feminization of unions and increasing commitment to represent diversity; and by the desire to learn from seemingly more dynamic and successful social movements, particularly in reaching out and organizing younger workers. Allying with social movements has often proved difficult for trade unions, however, and clearly there are significant constraints on change of this kind. These include the imperviousness of traditional union culture to new influences, a fragmented system of bargaining that biases representation towards immediate workplace issues, and the changing political environment that has re-opened some traditional routes of access for the trade union movement and so reduced the incentive to form alliances.

14. Social partnership

'Social partnership' is an ambiguous term with many different and sometimes conflicting meanings (Ackers and Payne, 1998). For some actors it is merely a new and fashionable name for a traditional collective agreement; for others it designates a fundamentally new relationship between unions, workers and employers based on a high degree of cooperation and trust in pursuit of shared objectives (cf. Kochan and Osterman, 1994 for the very similar notion of a 'mutual gains enterprise'). Although some writers refer to partnerships in non-union firms, and others use the language of 'employee involvement' to focus on direct employee participation, the TUC is adamant that meaningful partnership must entail union influence as is clear from its six principles of partnership: shared commitment to enterprise success; recognition of legitimate differences of interest; commitment to employment security; good quality of work life; extensive information and consultation; and mutual gains (TUC Partnership Institute, 2001a, p. 2; Knell, 1999).

Conceptually we can differentiate **forms** of partnership agreement according to the balance of power between the parties. For this purpose we can draw on Crouch's (1992) distinction between employer-dominant and labour-dominant forms of national corporatist arrangements, although it is probably more sensible to think of these categories as two ends of a continuum rather than two simple types of arrangement. Employer-dominant partnerships would be characterized by a balance of power favourable to the employer, by an agenda that primarily reflected the employer's interests and by outcomes far more favourable to the employer than to workers and unions. At the other end of the continuum we find 'labour-dominant' arrangements where there is a more even balance of power, and a jointly determined agenda, as well as mutual and more equal outcomes.[9]

We can also distinguish between different **levels** of union partnership with other bodies. At European level the term can refer to union involvement in the 'social dialogue', with employers' organizations, governments and European bodies (Falkner, 1998 and see below). At state level it refers to relations between the TUC and the Government as unions try to re-establish influence over state policy after the hiatus of the Conservative years (Brown, 2000 and below). At sectoral level, social partnership has taken the form of union attempts to revive multi-employer collective bargaining in order to guarantee minimum employment standards and prevent rogue employers competing on low wages (Heery and Abbott, 2000). Finally, at company level 'social partnership' can refer to the negotiation of collective agreements designed to promote more cooperative relations within the firm. Because of the highly decentralized structure of collective bargaining in the United Kingdom, social partnership has become increasingly synonymous with company level partnership agreements; these will constitute the main focus of what follows.

Finally, in examining the impact of partnership agreements on unions and their members we need to distinguish between the **principles**, the associated **practices** and the **outcomes** (Guest and Peccei, 2001). In practice many agreements involve three core components: union concessions to the employer on one or more forms of flexibility (task, time, pay or staffing levels); union rights to information and consultation over strategic business decisions; and undertakings to employees about employment security, often involving increased training.

15. Corporate social partnership agreements

Because of the ambiguity surrounding the term it is hard to estimate the number of social partnership agreements in the United Kingdom. The current TUC figure is 60 to 70, whilst the most assiduous proponent of partnership, the IPA (Involvement and Participation Association), lists 48 agreements that conform to its principles (which are fairly similar to those of the TUC) (Monks, 2001; IPA,

[9] A number of trade union documents have also differentiated partnership agreements but using commonsense categories such as 'sweetheart deal' or 'active partnership' (MSF n.d.; UNIFI 1999).

2001).[10] The companies involved include some well known national and multinational corporations. In food and drink there is Allied Domecq, HP Bulmer, United Distillers (now Diageo); in finance, insurance and banking there is Barclays, the Co-operative Bank, Legal and General Insurance and NatWest; in the utilities sector, Hyder (formerly Welsh Water), National Power, PowerGen, Scottish Power and Thames Water; in motor vehicles, Borg Automotive, Leyland Trucks, the Rover Group and Vauxhall Motors; and in retail there is ASDA and Tesco (see IPA, 2001). The first point to note is that many of these agreements have been concluded in heavily unionized firms within industries undergoing substantial and dramatic restructuring. In the British banking industry, a combination of deregulation, intensified competition, mergers and new technology led to the loss of 125,000 jobs between 1990 and 1995 from a labour force of 500,000 and the job losses have continued since then (LRD, 2000; Storey et al., 2000). Following the privatization of British utility firms in gas, electricity and water between 1986 and 1991 there has been a sustained period of labour shedding and merger to create multi-utility corporations. For example, the two major electricity companies, Power Gen and National Power, cut their combined 23,000 strong workforce by almost 50 per cent in the two years after privatization (Colling and Ferner, 1995, p. 497). (Retail is an exception because it is a sector where employment is rising and redundancies are rare). Such restructuring will weaken the labour market power of unions and suggests that the partnership agreements in these firms are likely to be employer-dominant forms.

16. Outcomes of partnership agreements

We shall look in turn at union membership, union influence and terms and conditions of employment, although the available evidence is often patchy and inconclusive.

Union membership. There are just two partnership agreements where unions have reported a subsequent rise in membership. At Tesco, the shopworkers' union USDAW increased its membership by almost 20,000 during the first twelve months of the agreement, a rise in density from 51 per cent to 58 per cent (Haynes and Allen, 2000, p. 12). White-collar union MSF saw its membership at Legal and General Insurance rise by 25 per cent in the first four months of its partnership with the company (Haynes and Allen, 2000, p. 8). Precisely why membership rose in these cases is not yet clear.[11] Agreements elsewhere, e.g. in the utilities, have invariably been accompanied by membership losses because these highly unionized firms have shed many jobs. One claim sometimes made by unions is that partnership agreements may have protected unions against membership loss by reducing the employer's incentive to de-unionize. It is certainly true that a number of 'partnership' employers either considered de-unionization before opting for 'partnership' or threatened to de-unionize in order to secure union compliance with a 'partnership' agreement. Examples of the former include the Co-operative Bank, Legal and General, National Power and Tesco; examples of the latter include Allied Domecq, Bulmers, Hyder and United Distillers (Bacon and Storey, 2000, pp. 413-4; Haynes and Allen, 2000, pp. 6, 10, 11; IPA, 1996a, 1998; Marks et al., 1998, pp. 213, 217; Tesco n.d). Yet if some employers did back away from de-unionization because of the attractions of 'partnership', this fact calls into question the real character of a 'partnership' created under such inauspicious circumstances.

Wages and conditions. Here the evidence is even more mixed so the impact on perceived union instrumentality is difficult to establish. According to the TUC, partnership companies offer levels

[10] The IPA website confusingly provides details of 111 'mini-case studies' of partnership.

[11] The USDAW case is complex because the union had recorded national membership increases in the three years prior to the partnership agreement. There might well have been some increase in its Tesco membership even without the partnership agreement, but we cannot easily estimate what this might have been.

of pay 50 per cent higher than in comparable non-partnership firms and very rarely declare compulsory redundancies because of their commitment to employment security (TUC Partnership Institute, 2001b). Partnership companies are also said to offer more flexible, varied and satisfying work and as a result partnership agreements that have been put to employee ballots have usually been endorsed by large majorities, e.g. at Blue Circle, Barclay's Bank, Tesco and Thames Water (IRS, 1997, p. 15; Fusion, 2000, p. 7; Haynes and Allen, 2000, p. 11; IRS, 2000a, p. 7). The first claim is hard to square with other evidence. Partnership company Welsh Water increased manual wage rates by 15.6 per cent between 1993 and 1998 but wage rates in the rest of the water and sewage industry rose by 19.7 per cent over the same period (Kelly, 1999, p. 6). Recent (1998-2000) wage settlements in banking and finance and in retail have been almost identical between the partnership and non-partnership companies (IRS, 2000b). Companies with employment security guarantees are indeed less likely to implement compulsory redundancies, but the rate of job loss and the levels of felt insecurity amongst employees appear to be unaffected by partnership agreements (Cully et al., 1999, p. 80). Moreover a recent survey of 82 self-styled partnership companies found that less than one in five operated a no compulsory redundancy policy (Guest and Peccei, 2001, table 3d). Where such policies are in place they are sometimes applied unevenly, with strong protection for 'core' workers but little or no protection for 'peripheral' workers (e.g. fixed term contract or agency staff) as at Hyder and Scottish Power (IRS, 1998, p. 13; IPA, 1996b, p. 4). Given that unions are increasingly looking to recruit amongst the 'contingent workforce' these types of exclusionary agreement on job protection do not send out a very positive message (Heery et al., 2000a, p. 406).

Union influence over decision making. Partnership agreements normally declare they will provide significant union influence over corporate decision making and if true, this would augur well for the impact of partnership on perceived union instrumentality. Careful reading of the literature, however, suggests that what is often achieved is not **influence over** decisions but **involvement in** a decision making process. Whilst the latter is a precondition for the former, it is not synonymous with it. Survey data paint a fairly bleak picture of union influence in partnership companies. Guest and Peccei (1998) surveyed senior managers in 82 companies affiliated to the pro-partnership think tank, the Involvement and Participation Association. Three-quarters of the companies were unionized, but asked whether there was any need for trade unions in a successful partnership firm, the respondents were divided. Thirty-nine per cent thought there would still be a role for unions but the same percentage thought there would be no role for them at all. Asked about the influence of employee representatives over business decisions such as capital investment, product range and organization structure, a majority of respondents (between 52 per cent and 85 per cent depending on the issue) said that representatives had little or no influence (Guest and Peccei, 2001, p. table 3b).[12]

There is some limited evidence that union workplace influence may be adversely affected under partnership arrangements. Several agreements contain clauses that appear to dilute union influence through collective bargaining by upgrading a process of 'joint consultation' or 'joint problem solving' e.g. at Blue Circle, Hyder, Legal and General, Scottish Widows, Tesco, Thames Water and United Distillers (IRS, 1997; Thomas and Wallis, 1998; Legal and General, 1997; Scottish Widows, 1999; IRS, 2000a, p. 9; Marks et al., 1998, p. 219). Other evidence suggests that the role of workplace union representatives has been affected by partnership agreements. In some companies the representatives' role has diminished and they spend less time on union duties e.g. at Allied Domecq, ASDA, Blue Circle, Hyder and United Distillers (Marks et al., 1998, pp. 220-222; Taylor and Ramsay, 1998, pp. 133-136; IPA, 1996a, p. 5; IRS, 1998, p. 14). In several cases, however, both

[12] Evidence from the Irish Republic is relevant here because of its recent 14 year history of national partnership agreements between the government, employers' and unions, with strong encouragement from the parties to develop similar arrangements at corporate level. According to a major survey of 450 workplaces conducted in 1996-97, 'The evidence of partnership with trade unions if very modest indeed and only in exceptional cases are unions involved in strategic decision-making,' (Roche and Geary, 2000: p 28; see also Roche 1998).

the number of representatives and the range of activities have increased e.g. Legal and General and Tesco (Haynes and Allen, 2000, pp. 8, 12). The reason for these different effects is not clear.

17. Constraints on the partnership strategy

Social partnership is strongly endorsed by the TUC, by a growing number of unions and by Government and it has proved an attractive option for employers facing the prospect of union resistance to major organizational change or restructuring where de-unionization was too risky. But the total number of such agreements is very small and the weight of evidence suggests that the preference of many employers is for direct communication with their workforce and for direct, job-focused forms of employee 'involvement' rather than union-based forms of indirect representation on strategic issues. It is true that since the passage of the Employment Relations Act (ERA, 1999) employers have had less freedom to resist unionization and to de-unionize because the Act lays down procedures regulating both these options. Nevertheless, it would be wrong to see the ERA as an inducement to partnership, despite claims to that effect by the Government and some of its supporters (Brown, 2000). Evidence from the US certification system (on which the British system was partly modelled) suggests that a legal procedure for union recognition is just as likely to promote adversarial industrial relations (Adams, 1995).

In any event the framework of corporate governance and financing in the United Kingdom places a premium on short-term performance and the maintenance of shareholder value, effectively diminishing managerial responsiveness to other corporate stakeholders such as employees or unions (Sisson, 1995). The result is that labour shedding continues to be a highly attractive strategy for British employers keen to reduce unit labour costs, a fact which militates against employment security pledges, one of the key union demands of partnership agreements.

18. Unions and politics

In addition to exercising market power, through collective bargaining or social partnership for example, unions invariably seek to deploy political power, exploiting their connections with Labour parties and their influence over governments. Following the Conservative election victory in 1979 unions became convinced of the need to secure the re-election of the Labour Party in the belief that Labour policy and legislation would help revitalize the union movement. On the face of it the evidence to date is encouraging. Since its victory in May 1997 the Labour government has passed a series of measures, often at the behest of unions, which have benefited unions and their members. Under the Employment Relations Act there now exists a statutory procedure through which unions can secure recognition from an employer for collective bargaining. In addition individual workers have the right to be accompanied by a union representative to disciplinary (and some grievance) hearings even where the union is not recognized. Preliminary evidence suggests that the recognition law is already having its intended effects of encouraging unions to step up organizing campaigns and encouraging employers to reach voluntary recognition agreements with unions (see above). The ERA also contains a number of 'family friendly' measures such as a right for new fathers to take up to three months unpaid leave to spend time with their children. The other major labour market initiative from 'New Labour' was the statutory National Minimum Wage, introduced in response to recommendations by the tripartite Low Pay Commission. Although fixed at a level some way below that sought by the unions, it has since been increased in line with inflation and it did benefit almost two million employees, 69 per cent of whom were women (Metcalf, 1999, pp. 182, 194). Finally, by signing the European Treaty of Maastricht the Government signalled its willingness to accept a number of labour market reforms that had been blocked by the previous, Conservative administration.

There is research showing that government policies were part of the explanation for declining union membership in the United Kingdom (Brown et al., 1997). The new measures should therefore have boosted union membership and influence, and early evidence is consistent with these predictions. Aggregate union membership rose in 1998 for the first time in 19 years and unions now have significantly more contact with government ministers and more input into policy making than they have had for a long time (McIlroy, 2000, p. 5).

However, the link between government policy and union fortunes is more complex for two reasons. First, some factors known to be associated with union membership have been changing in a favourable direction since the early or mid-1990s. Unemployment began falling in 1993 and by February 2001 it had dropped to its lowest level since 1979 (although the union membership-unemployment link is not straightforward: see Waddington and Hoffman, 2000, p. 56-57). The volume of union resources committed to organizing has increased in recent years, following the election of John Monks as TUC General Secretary in 1994 and the decision in 1997 to create the Organising Academy (see above).

Second, there is considerable debate about the degree to which New Labour measures in total are supportive of union membership and here three points are typically made. First, despite the pro-union impact of the ERA, other government measures may well damage union membership. Labour remains committed to the Conservative policies of restricting the right to strike and of privatizing public services. The former cuts union power whilst the latter has often involved job losses and de-unionization. The London Underground transport system and the air traffic control system are both scheduled for privatization and the outsourcing of local public services is to continue under a set of regulations very similar to those in force under the Conservatives (Hay, 1999, pp. 127-130; McIlroy, 2000, pp. 9-12; Smith and Morton, 2001, pp. 130-131). Second, the Labour government has demonstrated its attachment to labour market deregulation by opposing the imminent European Directive on information and consultation rights for workers and by weakening the impact of European Directives on working time, part-time workers' rights and parental leave (Brown, 2000, p. 304; Undy, 1999, p. 328). A legal challenge from the unions against this latter policy is now pending at the European Court of Justice. Third, the Labour party has enacted a series of reforms since 1993 designed to reduce the influence of trade unions within its decision-making structures and to cut its financial dependence on the union movement. In 1979 the Labour party received approximately 86 per cent of its annual income from the unions; by 1995 this figure had dropped to 45 per cent (McIlroy, 1995, p. 285).

19. Concluding remarks

In 1999 British trade union leaders were jubilant about the first increase in aggregate membership for 20 years. Was this outcome a temporary interruption of a downward trajectory or did it herald the revitalization of the labour movement? By examining a range of union strategies we have tried to throw light on this issue and our main conclusions are as follows. First there is undoubtedly evidence that more resources are now being devoted to union organizing than even five years ago. This is clear from surveys of union organization, from appraisals of the Organising Academy, and from the number of recognition agreements signed in recent years. Although the evidence also points to unevenness and limitations in the spread of an 'organizing culture', the result is that more unions have acquired the capacity to grow and are returning to growth. Second, political links have played a part in this limited membership recovery because it was through union influence over the Labour Party that the union recognition provisions of the ERA were enacted. Third, links with social movements have exerted a limited but potentially significant influence on union recovery through the recruitment of small numbers of social movement activists into the Organising Academy. In addition, the steady growth in the proportion of women trade unionists and trade union officers is

slowly feeding through into an increased union concern with issues such as family-friendly policies that could increase their attractiveness to non-members.

The impact of union mergers on membership and influence appears to be fairly marginal. Although it has resulted in significantly fewer unions than 20 years ago it does not appear to have reduced inter-union competition. The union movement is increasingly dominated by multi-occupation, multi-industry unions, each covering a large and diverse set of overlapping job territories, which thus give rise to both intra- and inter-union competition. The competitive effects of this union pattern are in turn exacerbated by the employer preference for single union recognition agreements. The impact of social partnership agreements on union membership and influence is as yet unclear, although the limited evidence to date does not look encouraging.

A similar conclusion could be advanced for union international links. Whilst the British TUC has long been highly active on the European political scene, particularly during the dark days of the Thatcher era, it would be hard to pin down measures that would not have been passed without its presence or to identify clear links between European measures and the recent recovery of union membership. Finally it needs to be said that the impact of union strategies has interacted with the political context (the 1997 change of government) and the economic context (in particular the continuing fall in unemployment).

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