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STUDY

Trade Unions in Transformation

Transnationalizing Unions: The Case of the UAW and the IG Metall

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- German and US auto workers' unions have embarked on a new trajectory. By establishing the Transnational Partnership Initiative (TPI), the United Autoworkers Union (UAW) and the IG Metall have made a statement: building transnational solidarity is the expression of enlightened self-interest of unions in the globalized economy of the 21st century.

- Only by strategically mobilizing associational and institutional resources can both unions leverage global corporate power in defense of workers' interests across borders. The case study focuses on the initiation and preparation phase of this transatlantic cooperation and traces the importance of establishing multi-level interaction and understanding – the foundation of a more systematic and thus strategic transnational project.

- Trade Unions in Transformation is an FES project that identifies unions' power resources and capabilities that contribute to successful trade union action. This study features among two dozen case studies from around the world demonstrating how unions have transformed to get stronger.

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Abstract

This is a case study of the processes that have put the transnational cooperation of the German IG Metall and the UAW in the U.S. on a new trajectory. It is a template for the challenges unions face in adapting their self-interest toward building transnational solidarity and being able to leverage global corporate power in defense of workers' interests across borders. Using the power resource approach, it highlights the importance of developing capabilities toward understanding and strategically mobilizing associational and institutional resources towards achieving a more lasting and effective mode of transnational trade union cooperation. The case study focuses on the initiation and preparation phase of a more intensive cooperation, culminating in a formal agreement to establish a Transnational Partnership Initiative (TPI) in 2014. Although there were no organizing gains in this phase, it was crucial for building trust and mutual understanding, as well as for actively promoting a broadly-based anchoring of the TPI policy-wise in both unions. The case study's conclusions are generally positive on this count, yet preliminary as the overall project is work in progress and its basis of support beyond the two unions (societal power) still untested.

1. Introduction

At the end of 2010 and in the early part of 2011, the United Auto Workers (UAW) in the USA and the IG Metall in Germany initiated steps toward an ongoing, and thus more stable and more extensive cooperation, opening what has since turned out to be a new chapter in their relationship. »Organizing the foreign automakers (so-called ›transplants‹)« in the U.S. was the overriding goal, deemed essential for the future of the UAW as the voice of autoworkers in the U.S.[1] Over decades, the UAW had established itself as a powerful organizational fixture representing workers' interests at the three major U.S. auto manufacturers General Motors (GM), Ford and Chrysler, the so-called Big Three. While it had been able to keep these firms from relocating their plants to the U.S. South with its low wage levels and anti-union politics, it had not been able to slow the pace of auto suppliers from the Midwestern and northern states relocating. Furthermore, the UAW could not prevent foreign automakers from building plants in the South and taking advantage of this opportunity to avoid unionization, profit from low labour costs, and gain a foothold in the U.S. market.

The UAW regarded unions from the home countries of the transplants as being pivotal partners in its goal to organize the transplants. Shortly after his election to the presidency of the UAW, King reached out to the IG Metall in Germany, seeking advice and support in the UAW's efforts to gain recognition at German automakers Volkswagen, Mercedes (Daimler) and BMW. Before his election King represented the UAW on the supervisory board of the GM subsidiary Opel and had a good working relationship with the other employee representatives from the IG Metall. Indeed, King and the UAW regarded the institutional power of the IG Metall as a »game changer« in this struggle. Nevertheless, this was not an easy or self-evident step for the UAW. For a number of years, relations between the two unions had not been close, at times even quite dissonant, and the two unions had no track record of structured transnational cooperation beyond the usual training seminars, delegation exchanges, and meetings under the auspices of the International Metalworkers' Federation (IMF).

Responses to King's initiative in the IG Metall ranged from skeptical to highly positive. At the IG Metall, King's initiative resonated for a number of reasons. While the IG Metall leadership initially saw no pressing need or organizational logic to »come to the rescue«, its International Department took the initiative to be a confirmation of its recent efforts toward more mutual engagement at the staff level. King's initiative provided an opportunity for the IG Metall to take a more active role in dealing with specific issues in the U.S. such as union recognition at the new Volkswagen plant in Tennessee and at the Mercedes plant in Alabama. More generally, within the IG Metall there was a major policy drive in progress aimed at enhancing the union's associational power. Building a stronger working relationship with the UAW would help the department to define how international union activities could contribute to this membership-driven policy

1. As Automotive News stated in a report dated Dec. 29, 2011, »By failing to organize factories run by foreign automakers, the union has been a spectator to the only growth in the U.S. auto industry in the last 30 years.«

orientation in the union. As such, both unions had a clear interest in exploring the possibilities of constructing a transnational partnership. The groundwork that was laid in this period would culminate in a milestone in the spring and summer of 2015, when the governing bodies of the UAW and the IG Metall established a Transnational Partnership Initiative (TPI). The purpose of the TPI is to »collaborate to improve wages and working conditions for employees at German-owned auto manufacturers and suppliers in the U.S. South« and to »expand on the principle of »co-determination« between management and employees by establishing German-style works councils or similar bodies to promote employee representation.«[2]

This case study will focus on the groundbreaking phase leading up to the establishment of the TPI, which is currently still »work in progress«. These processes have put the transnational cooperation of the two unions on a new trajectory and provide an opportunity for exploring the foundations and challenges of transnational union cooperation. The analysis will use the power resource approach to evaluate the IG Metall-UAW case and draw insights for more general applicability regarding the building and strengthening of transnational union alliances. In particular, this case sheds light on the interdependency of structural, associational, institutional and societal power resources. While reflecting on the varied challenges of constructing a transnational partnership and defining its role in the overall project, the case study will also shed light on how an over-reliance on one of these resources – the institutional power of the IG Metall – can be a strategic liability. Analytically, the case study will seek to explain the challenges and the mobilizing processes of power resources using a catalogue of capabilities introduced by Levesque and Murray (2010). In both the UAW and the IG Metall international trade union policy and transnational union activity has long been in the hands of a relatively limited number of responsible experts. These experts were the nucleus that initially carried the process forward. In the long run, however, creating TPI required the basic understanding that for transnational cooperation to grow and be successful the project needed to be framed and articulated so that it would be more substantially anchored and gain broader support within each union, a prerequisite of building transnational associational power. How this has played out and how it is intersected with the vastly different institutional power settings of both unions are issues about which the case study will seek to provide insights. The challenges of institutional power faced by each of the two unions differ considerably between Germany and the U.S., something that is not without relevance for framing a common strategy. In Germany, the IG Metall is certainly well-anchored institutionally, but to what extent that institutional power can be mobilized in an international context has up to now only been tested in a limited sense (for example European Works Councils). For the UAW on the other hand, the challenge is even more basic in the sense of finding the means of protecting its existing institutional power base at the Big Three by expanding it to encompass both suppliers and foreign transplants in the U.S. auto industry today.

The case study is based on public and internal union documents, interviews[3], and my personal experiences as a consultant and participant observer. It begins with a general introduction to the national and transnational context of the two unions' responses to the challenges of globalization of the auto industry. This is followed by a presentation of the major goals and strategies that marked the initiation of a transnational partnership. In a third section, the making of this partnership, its implementation, is discussed in the context of the overall campaign to organize the subsidiaries of German auto manufacturers and suppliers in the U.S. The final two sections use the power resource approach to provide a critical reflection and analysis of the results and successes of this case. Much of what can be drawn from this case in terms of lessons is however preliminary as the case represents only one phase – albeit a highly important one – in a more comprehensive »work in progress«.

2. Context and Problems

This section will focus primarily on conditions in the U.S. While the development of an ongoing and focused partnership relationship became a joint effort by both the UAW and the IG Metall, the initial contributing factors can be found in the profound impacts that globalization has had on the U.S. auto industry – and on the UAW and the scope of its institutionalized labour-management

2. UAW Press Release, Nov. 19, 2015; http://uaw.org/uaw-ig-metall-announce-u-s-partnership/.

3. The interviews were conducted under the condition that they would be used as background information and not as personal quotes.

relations. It was the U.S. context that provided the impetus and the rationale for the UAW to approach the IG Metall. For its part, the IG Metall was certainly never insulated from or indifferent to the global expansion of the industry. Indeed, outsourcing, offshoring and the spread of temporary agency work were serious threats to the stability and success of its collective bargaining policies. However, it was affected differently, and its nationally-oriented policy approach – unlike that of the UAW – did not leave it struggling to survive. The UAW's initiative resonated in the IG Metall because it offered an opportunity to address questions about the viability of this solely national approach in a globalizing economy. What can be discerned from this is that the trajectories of the two unions toward building a transnational partnership have advanced along very different paths, i. e. that of the UAW more reactive, and that of the IG Metall more proactive.

3. Coping with Globalization I: The UAW and the U.S. Auto Industry

The election of Bob King[4] as UAW President in June 2010 set the stage for a concerted effort by the union to stem membership losses and redefine its policy focus. Up until the 1980s, the UAW had experienced ongoing membership growth, reaching a peak of over 1.5 million members in 1979. Since that time, membership in the UAW, as in most U.S. unions, had been in decline, mirroring the increasing decoupling of wages from productivity growth. By the year 2000, the UAW had lost 56 per cent of its membership due to automation, the offshoring of jobs in the auto industry and the increase in non-union plants at suppliers and foreign manufacturers. At the time of King's election, UAW membership had dropped below the 400,000 mark, hovering at 355,000 at the end of 2009. In a labour relations system like the U.S., where a union exists only in workplaces where it has a majority, the associational power of a union is existentially dependent on active membership, and King saw the future of the union endangered if this trend were to continue. Speaking to a union conference in January, 2011, King told the delegates »If we don't organize these transnationals, I don't think there's a long-term future for the UAW, I really don't.«[5]

Since the 1980s, the UAW had repeatedly failed to organize the transplants[6] and extend coverage of the partnership programs (joint committees) it had negotiated at the Big Three to accommodate them (Köhnen 2000: 170). With growing regularity, Japanese, Korean and German manufacturers were opening new production sites (and drawing in suppliers) in the U.S. South[7], where wages were significantly lower and unions were challenged by legal restrictions (so-called »right to work laws«[8]). Moreover, union drives for recognition take place in widespread climate of aggressive anti-unionism and their success depends on securing a 50 per cent plus 1 majority at each workplace. Today, foreign transplants employ ca. 75,000 workers and account for more than one-half of U.S. auto production. None of them has a recognized union or a collective agreement; and the situation at auto suppliers, where three out of four auto workers in the U.S. are employed and wages are significantly lower (Ruckelshaus and Leberstein 2014), is not much better (Bronfenbrenner and Hickey 2004; Aschoff 2012: 137). While the UAW has been able to maintain its collective bargaining arrangements with the Big Three, the institutional power derived from that arrangement is endangered in relation to the industry as a whole.

The Missing Link: UAW and Transnationalism

A further problem lies in conjunction with the scope of the UAW's approach to organizing the foreign transplants during the three decades up to 2010. Like most manufacturing unions in industrialized countries, the UAW had developed a domestically focused policy agenda in the Keynesian context of the post-World War II era, relying solely on its shop floor strength for collective bargaining and on its political connections at the local, state and federal level in the U.S. to back up its position in the industry. Internationalism was propagated, but it was the domestically-driven policies that counted (Logue 1980).

4. Bob King was born in Michigan in 1946. His father, William J. King, Sr. was director of industrial relations at Ford Motor Company. On June 15, 2010 he was elected President of the UAW.

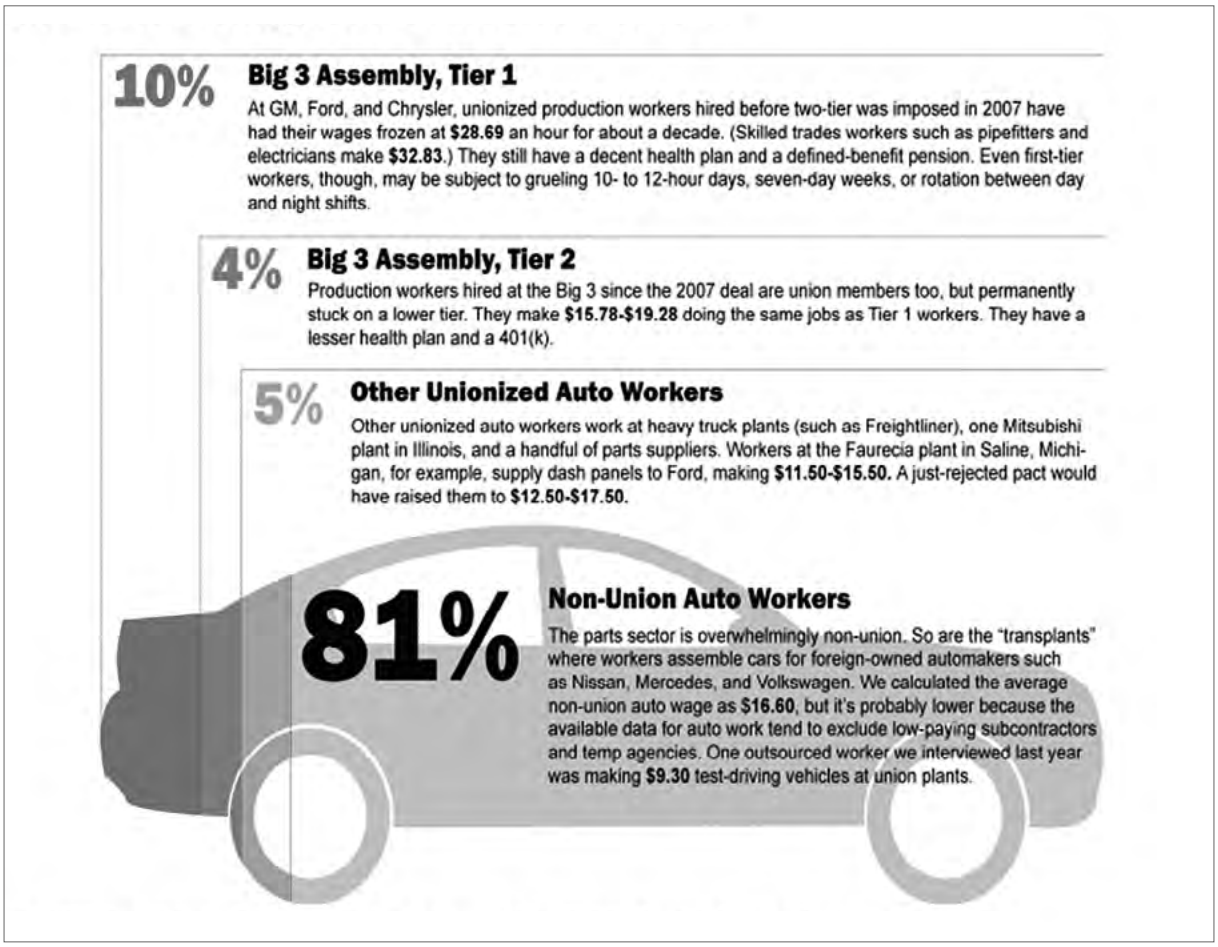
5. http://www.crainsdetroit.com/article/20110118/FREE/110119848/bob-king-if-uaw-cant-organize-foreign-plants-i-dont-think Download Nov. 4, 2016.

6. Only at the joint ventures NUMMI (GM and Toyota), Diamond-Star (Mitsubishi and Chrysler), and AutoAlliance (Ford and Mazda) did the UAW gain recognition. Reportedly, these joint ventures produced one-third of the foreign autos in the U.S. in 1995. USA Today, Sept. 28, 1995.

7. The auto industry grew in Kentucky, Tennessee, South Carolina, Georgia, Alabama and Mississippi. See Rubinstein 2000; Rubinstein and Kochan 2001

8. Right to work laws exist in over one-half of the 50 U.S. states. While federal law requires legally recognized trade unions to represent and bargain on behalf of all employees in a bargaining unit (plant, company), whether they are union members or not, right to work laws at the state level allow non-members to avoid paying any fees in support of union representation activities.

Figure 1: Who's Making Cars and Trucks



Source: UAW National Collective Bargaining Departments, Bureau of Labor Statistics Quarterly Census of Employment and Wages, Center for Automotive Research, *Labor Notes* reporting and calculations; in: Wall Street Journal, Dec. 1, 2008, Labor Notes 2015[10].

Even as the globalization of the auto industry began increasing significantly in the 1980s and 1990s, the UAW made no concerted effort to achieve more continuity and depth in the existing sporadic interaction with automobile unions from other countries. Organizing drives at BMW (Spartanburg, Georgia), Honda (Marysville, Ohio), Nissan (Smyrna, Tennessee) or Mercedes (Vance, Alabama) in the 1980s and 1990s were conducted with little or no attempt to involve the respective union in the transplants' home country. Nor did institutional contacts gained through supervisory board positions at Opel in Germany, or at DaimlerChrysler in the U.S., lead to organizationally anchored transnational policies[9]. As more than one high-ranking UAW staff member noted, the 1980s and 1990s were a time when the UAW's arrogance regarding its supposed associational and institutional power at home isolated it transnationally.

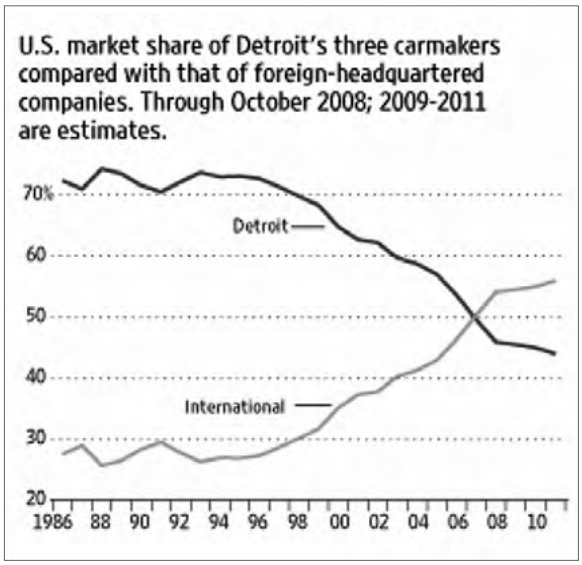
4. Coping with Globalization II: The IG Metall and the Challenges of Upheaval

During the 1980s, the IG Metall was also confronted by the impact of globalization in the auto industry. As in the U.S., auto manufacturers in Germany responded to the challenges posed by Japanese and Korean manufacturers with work reorganization, outsourcing and offshoring, but market conditions were different in Europe and job

9. UAW representation on the board of DaimlerChrysler was however used to secure a card check/neutrality agreement at Daimler Trucks North America that led to the recognition of the UAW at one of the largest plants in North Carolina.

10. In 2015, the UAW successfully negotiated a phase-out of Tier 2.

Figure 2: Changing Lanes



Source: Center for Automotive Research; in: Wall Street Journal, Dec. 1, 2008, Labor Notes 2015.

loss was in no way comparable to the U.S. Additionally, the IG Metall had come out of a series of conflicts in the 1970s in a much stronger position to cope with these changes than the UAW. Organizationally, it was holding its own. During the 1980s, membership hovered at around 2.6 million, with some 40 per cent of union members employed in the auto industry. Institutionally, the West German setting of labour relations provided a more comprehensive and stable environment for negotiating change. (Turner 1991) The IG Metall developed extensive policy programs for »rationalization protection« and »group work«, giving needed support to works councils in their negotiations with factory managers. At the same time, as unemployment rose in the 1980s, the IG Metall embarked on a public campaign to protect jobs and reduce working time by cutting weekly hours from 40 down to 35. Bitter employer resistance necessitated a six week strike in 1984. But in the end, the reduction was acceded to, even if only incrementally. (Silvia 2013: 122)

Unforeseen changes in the organizational stability and reach of the West German trade unions came with the unification of Germany. Only months after the fall of the Berlin Wall in November 1989, the IG Metall and the other unions in the German Trade Union Federation (DGB) were already setting up offices in East Germany, and the accompanying organizational challenges largely absorbed the German unions during the decade of the 1990s. (Fichter 1997) Unification had unleashed some fundamental changes in the formerly stable world of the »German model« of labour relations, leading to growing losses in membership and a lessening of collective bargaining coverage. Unification was also part of the larger changes in Europe following the implosion of the Soviet Union and its control over the countries of Eastern Europe. German industry took advantage of the new investment opportunities and the lucrative low-wage labour markets in the East to expand and relocate. Often the mere threat of relocation sufficed to force through more flexibility and opt-outs in union contracts. The German economy, and especially those sectors such as automobile represented by the IG Metall, is strongly export-oriented and highly integrated into the global economy. As such, the global financial crisis of 2007–2008 disrupted auto production in Germany and threatened to leave tens of thousands of auto workers unemployed. The IG Metall and other German unions were able to stave off such extensive layoffs by re-activating previous government programs to subsidize workers on reduced hours in conjunction with premiums for trading in old cars for new ones. Short-time work was organized at firm level in negotiations between works councils – generally union members – and management, enabling the IG Metall to strengthen and activate its basis. (Silvia 2013: 170f) At the same time, union institutional power proved to be unable to prevent the government from deregulating the labour market and promoting temporary agency work in response to the crisis.

The Existential Link: IG Metall and Transnationalism

At the end of the 1990s, the merger between the Daimler AG and Chrysler Corporation »placed two of the world's most powerful labor unions – the Detroit-based United Auto Workers union and Germany's giant IG Metall – under the same corporate roof.« (Swoboda 1998) Yet the opportunity for closing ranks between the two unions never developed for a few reasons. For one, DaimlerChrysler (DC) was managed as two separate corporations. Also, the UAW was pre-occupied with its own merger plans with two other U.S. unions and as the corporate merger increasingly grew into an economic fiasco, neither the UAW nor the IG Metall found a common ground for cooperation. The UAW organizing drive at the Mercedes plant in Alabama in 1999 failed on its own, the

IG Metall was never directly involved[11]. Even the shared seats on the DC supervisory board did not foster a closer relationship. Indeed, it caused problems when a UAW representative voted with the shareholders and against employee and IG Metall representatives on a management proposal to eliminate a sizable number of jobs[12].

Such an incident reflected what the IG Metall perceived in general to represent UAW's disinterest in developing comprehensive, long-term and strategic approaches to organizing U.S. subsidiaries of German corporations. IG Metall staff in the International Department charged the UAW (and other U.S. unions) with harbouring overblown expectations regarding the IG Metall's institutional power to leverage German companies through works councils and supervisory board members. U.S. unions were also criticized for waiting until the last minute to signal for help in their organizing campaigns at German subsidiaries – and in the 1990s, when asked to support and implement a joint organizing project, they stalled. (Steiert 2008)

Nevertheless, following Berthold Huber's election as chairman in 2007 and personnel changes in the International Department, the IG Metall began reassessing the status of its mostly company-specific relationships with the UAW. With the three major German car manufacturers BMW, Mercedes and Volkswagen dedicated to having production facilities in the U.S., and major U.S. auto suppliers (i. e. Delphi, Visteon, VDO) expanding operations in Germany, the IG Metall reasoned that there was a growing need of eventually being able to improve the effectiveness and impact of how the two unions worked together. Huber was not well received by the UAW leadership on a first visit to Detroit in early 2008, but he persisted, and toward the end of the year working relationships had been established at staff level during meetings in the U.S. and in Germany.

5. Goal-setting and Strategy

At the outset of the process that led to a formal transnational partnership, the primary goal of organizing the workforces at foreign automakers in the U.S. was shared by both unions. With German OEMs and suppliers continually increasing their presence (production sites) in the U.S., the IG Metall leadership was keenly interested in finding out whether any of these sites could be organized by the UAW and how it could be accomplished. But it was the new leadership of the UAW that had the elements of a plan for achieving that goal and that took the initial steps toward its realization.

Immediately following his election as president of the UAW in June 2010, Bob King announced that it was imperative for the survival of the UAW to organize the workforces at the foreign automakers (»transplants«) in the U.S., most of whose production sites are located in the southern states[13]. King framed this task in the context of a new UAW, a UAW for the 21st century. As he explained at an auto industry conference a few months later, the »UAW of the 21st century must be fundamentally and radically different from the UAW of the 20th century.« In order to »address the challenges of rebuilding a global middle class«, the UAW was ready to recognize that »flexibility, innovation, lean manufacturing and continuous cost improvement are paramount in the global marketplace.« Through the cooperation achieved in overcoming the crisis of 2008–2009, »the 21st-century UAW no longer views these managements as our adversaries or enemies, but as partners in innovation and quality. Our new relationships with these employers are built upon a foundation of respect, shared goals, and a common mission.« King also expressly welcomed the foreign automakers »as partners and colleagues in the industry. We appreciate the fact that you are providing good jobs here. We admire many of your good policies and practices, including the focus on continuous improvement, quality and productivity. The transplants are an important and essential part of preserving, maintaining and growing our manufacturing base in this country«, but at the same time, too many employers had chosen to make the U.S. »union free«, counteracting workers' constitutional rights to free speech. For that reason, the UAW was ready to take action to defend »the principle of a fair secret-ballot election in which workers can decide freely whether or not to join the union.«[14] (see also Grossfield 2011)

11. A Union March on Alabama: U.A.W. Is Facing Uncommon Odds at Mercedes Plant. New York Times, June 29, 1999.

12. Sogar 16.000 Jobs gefährdet, Spiegel Online, Dec. 19, 2005; IG Metall and DaimlerChrysler say IG and UAW to speak »with one voice«, AFX. COM, Feb. 22, 2006

13. King Calls for Auto Industry Organizing To Recoup UAW's Economic Concessions. Labor Relations Week, 24LRW1037, June 24, 2010.

14. Bob King, A UAW for the 21st Century. Speech delivered to the Center for Automotive Research Conference, Aug. 2, 2010

Shortly thereafter, the UAW published its Principles for Fair Union Elections that sought to create a level playing field in the increasingly acrimonious process of union recognition resulting from employer »union busting« attacks (Logan 2006). Therein, the UAW called on employers to endorse eleven principles such as »no coercion«, »equal access to the electorate«, and »no disparaging of the other party« in order for the climate of fear to be eliminated and allow for »free, democratic elections«. (UAW United Automobile Workers 2011)

King realized of course that »rebranding« the UAW and appeals to the employers to refrain from »union busting« alone would not make for success. He also spoke of the need to demonstrate associational power by mobilizing »all 1 million active and retired members in the organizing push.«[15] He also saw a need to flank these core elements of his plan by bringing in partners. To organize the foreign transplants in the U.S. South, the UAW was ready to make a concerted effort to reach out to the home country unions of those foreign corporations and enlist their support in this endeavour. King took the unconventional step of telling an international audience of union representatives from the auto industry that the UAW needed help.[16] It was the German union IG Metall that became his primary choice with its high membership density (associational power) in the auto industry coupled with the institutional power of supervisory board members and employee representative bodies (works councils) at German auto manufacturers and suppliers. King had worked with IG Metall representatives as head of the UAW Ford department, on the supervisory board of Opel in Germany, and in global auto committees at the International Metalworkers' Federation. In addition, the UAW reasoned that German auto manufacturers – BMW, Daimler/Mercedes, and Volkswagen – were more open to building cooperative relationships with the UAW because they had negotiated and signed Global Framework Agreements with the unions whereas the Japanese and Korean brands had not.

At the IG Metall, Bob King's initiative in reaching out was greeted with interest, despite past difficulties in their relationships. Shortly after announcing the start of the UAW campaign to organize the transnationals, King travelled to Germany to meet with IG Metall leaders and works councillors and present his plans. There he asked his German colleagues to discuss the treatment of unions in the U.S. with top management in the German auto industry. King argued that U.S. management lacked the authority to revise its anti-union approach. And he called on the IG Metall and the works councillors to keep an eye on management and hold them accountable for treating unions in the U.S. as they were treated in Germany: With respect for labour rights.[17]

These first meetings in 2011 did not immediately result in harmonized and coordinated activities among the various actors involved. At Mercedes, the Daimler works council did not get involved in the UAW's organizing activities until several months later after reports from the field and lobbying from IG Metall headquarters made it clear that direct help was needed on the ground. By the end of the year, works council members were making regular visits to the U.S. plant to coordinate activities and run informational sessions on German labour relations.

The UAW had prioritized the organizing drive at Volkswagen, and so UAW president King and his Director of Region 8 (U.S. South) teamed up to seek an ongoing dialogue with the VW works council and the corporation's human resource department[18]. Parallel to these activities, IG Metall headquarter staff served in part as a liaison for the interaction at both Mercedes and Volkswagen, but its role was not always clearly defined and recognized. Their attempts to discuss and coordinate activities – their own included – did not always elicit a positive response at the works council level. Among the department's staff members and their outside consultants debates around steps needed to move forward on transnational cooperation occurred regularly, but beyond the staff involvement and the two plant-specific organizing drives at VW and Mercedes, no outreach to the membership occurred.

15. Bob King: If UAW can't organize foreign plants, »I don't think there's a long-term future« for union, Crain's Detroit Business, Jan. 18, 2011. http://www.crainsdetroit.com/article/20110118/FREE/110119848/bob-king-if-uaw-cant-organize-foreign-plants-i-dont-think

16. IMF Automotive Working Group meeting, Detroit, November 8–9, 2010. http://www.industriall-union.org/archive/imf/strengthening-global-trade-union-work-in-the-auto-sector (download Nov. 24, 2016). The report of the meeting does not say that King literally called for help, but participants at the meeting confirmed this to me.

17. Respektiert Arbeitnehmerrechte. Interview mit Bob King, IG Metall.de, Feb. 1, 2011. https://www.igmetall.de/interview-mit-bob-king-vorsitzender-der-amerikanischen-6877.htm (download Oct. 17, 2016)

18. Initial contact with VW's headquarters in Wolfsburg, Germany had been made by King's predecessor as UAW President, Ron Gettelfinger, who visited VW together with IG Metall chairman Huber.

Given VW's record on international labour rights and the strength of the IG Metall and the works council in Germany, focussing on organizing the VW plant seemed to be the most promising approach. And so, when in February 2014, following a massive campaign by anti-union business and political interests, the UAW narrowly lost a vote on union recognition at that plant (Brooks 2016; Elk 2014), questions had to be answered and alternatives considered for a reconfiguration of the transnational project in the U.S. Over the next few months, several important strategy decisions were made. At the VW plant itself, the UAW vowed to try to keep the dialogue with company management and the works council in Germany going, but it was also ready to flank its dialogue strategy with an attempt to augment associational power by setting up a new union local for workers at the plant. This found the support of the IG Metall, and both unions agreed that a UAW local should also be established at the Mercedes plant. Secondly, it was decided to realign the focus of the transnational partnership. Prior to the vote at VW an internal policy paper commissioned by the IG Metall International Department had called for broadening the scope of the campaign. Noting that the organizing campaign and the transnational partnership had not achieved the expected results in its focus on the two German auto manufacturers, the paper called for shifting to a value chain approach that would encompass German auto supply plants clustered around or near the manufacturers. At a hastily called meeting of staff members from both unions, UAW organizers linked this idea to supplier organizing already in progress. Contacts with workers at various suppliers and ongoing research, subsequently published (Ruckelshaus and Leberstein 2014), showed that wages and working conditions were deplorable and generally much worse than at the brand manufacturers and that workforce fluctuation was high. For the UAW, realigning the transnational partnership to include German suppliers would link well to its ongoing organizing drives in the auto industry. For the IG Metall it entailed an organizational commitment that extended beyond the current operational centre in the International Department.

Thirdly, the level of interaction between the two unions had developed consistently and positively since the first meetings in 2011, but the magnitude of the challenges faced in seeking to build a transnational partnership for organizing the auto industry in the U.S. South required that this interaction be intensified and more extensively anchored in each of their organizations. Meetings and exchanges among the experts of both unions were necessary, but insufficient for developing, asserting and growing associational power. To that end, it was decided to establish a joint working group that would communicate and meet regularly, and in addition, the groundwork was laid for establishing an organizational presence in the U.S. staffed from Germany for information exchange and policy development. In Germany, the strategic link to this centre was to construct multi-level interaction both within and between the two unions for example by involving company-level union representatives and works councillors.

6. Implementation

Implementation in the context of this case study is concerned mainly with the making of a transnational partnership: How was it organized and »institutionalized«? How would it contribute to building associational power? How was its purpose intermediated, its strategies and goals framed and articulated? What learning processes occurred that impacted the understanding and use of power resources? To be sure, the making of the transnational partnership impacted and was impacted by developments on the ground as well as by the broader context in which this making occurred. The story of the UAW's organizing campaigns – including its unfolding in Germany – provides context for the »making« story and needs to be told, but it is not our main focus.

During the first years of renewed and growing contacts between the UAW and the IG Metall, implementation basically flowed along the strategy dimensions laid out by Bob King shortly after he was elected UAW president. His initial outreach to the IG Metall was generally regarded as an »ice breaker« by participants on both sides, and the two unions set about planning joint activities in support of organizing the workforces at the Mercedes plant in Vance, Alabama and the Volkswagen plant in Chattanooga, Tennessee. Meetings and seminars were scheduled to bring union officials (international affairs), organizers and works councillors together. After founding a new Global Labor Institute in early 2011 to add a global dimension to its organizing drives at foreign transplants, the UAW began preparing a select group of organizers for working with the IG Metall and its members on works councils. Shortly thereafter, this group flew to Germany to participate in a five day joint seminar

with IG Metall staff from several different departments along with employee representatives from VW, Daimler and BMW. The expectations of the participants ranged from sharing experiences and deepening relationships to learning why it was so difficult to organize the foreign transplants in the U.S. and understanding what the IG Metall, the UAW and the works councils at VW, Daimler and BMW could each do in support of organizing efforts at the U.S. plants. Understanding the role and influence of works councils was also high on the agenda, and at least one participant was keen to talk about how to establish works councils in the U.S.

Subsequent to this first broader contact, several of the UAW participants visited either VW or Daimler headquarters to meet with the respective works council leaders. As the UAW was focusing its organizing activities on the two U.S. auto plants of Daimler (Mercedes) and Volkswagen[19], such meetings were crucial for the task of laying the groundwork for interaction and support. This kind of dialogue was new, occurring in preparation of an organizing drive and not when it was already well-developed or under employer attacks. As such, it was a step toward developing more organizational continuity and a common understanding of what each participant could do, what their responsibilities were, and what could be expected from the others.

Activities in support of the UAW organizing drive at the Mercedes plant in Alabama initially centred on referencing Daimler's global framework agreement (DaimlerChrysler AG, DC World Employee Committee and International Metalworkers' Federation (IMF) 2002) as a means of pressuring management to issue an affirmative statement that the company would remain neutral during a union organizing drive, respecting the legal rights of workers to decide on union representation without interference from management. In addition, the unions sought access to the workplace for the UAW and works council representatives from Germany. When that was rejected by Mercedes management in the U.S., UAW and representatives from the Daimler works council devised a joint program of regular visits to the UAW organizing committee at the U.S. plant by German works councillors, participation in the meetings of the Daimler World Employee Council, and exchanges between UAW representatives at the Daimler Truck plants in North Carolina and workers from the non-union Mercedes plant in Alabama. During 2012, Daimler works councillors held week-long training sessions for Mercedes workers, did joint house-calls with their UAW colleagues, and published a UAW-IG Metall newsletter, but despite this intense cooperation and a successful recognition campaign at a major supplier to Mercedes during this time, the organizing drive was not gaining the support necessary to overcome the 50 per cent plus 1 hurdle needed for recognition. Workers were open to the idea of establishing a works council once the union had been recognized, but they expressed fear that Mercedes management was not really neutral and that there would be reprisals if they openly supported the union.

Strategy implementation at Volkswagen was given a higher priority because success seemed to be more likely. However, the UAW's plan ran into problems that ultimately cost the UAW a victory and raised many questions in regard to both implementation and strategy. The first problem grew out of the discrepancy between VW's »worker and union friendly« image and the anti-union climate fostered by management in the Chattanooga plant. Initial talks in Germany with the works council and with VW management in human resources went smoothly and Volkswagen boasted about its agreements that recognized and secured the rights of its employees around the world (Volkswagen AG, Volkswagen Group Global Works Council and International Metalworkers' Federation 2002; Volkswagen AG, Volkswagen Group Global Works Council and International Metalworkers' Federation 2009). At the Chattanooga plant, however, workers who openly supported union representation reported being harassed and disciplined by supervisors. The UAW passed on those reports to the works council and VW management in Germany, but they were ignored for over a year before the responsible managers in Chattanooga were finally removed. Their replacements ended the most blatant anti-union practices, but they could not stem the less than overt actions of line supervisors against union supporters on the shop floor.

Secondly, the chairman of the VW works council had in fact already undercut the institutional power-based strategy by making it clear that having a union at the plant was of less importance to him – and in his mind, to the company. His main concern was to be able to set

19. Until recently, the UAW considered the BMW plant in Spartanburg, South Carolina, which is currently the largest BMW production site outside of Germany, too difficult to organize. Moreover, the BMW works council has been generally reticent to get involved.

up an »in-plant body of workers' representatives«, i. e., a works council. The UAW was not at all opposed to having a works council, in fact, it had already started to look into the feasibility of transforming its own joint committee programs negotiated in contracts with the Big Three into a structure along the lines of the German model. Nevertheless, works councils were not recognized per se by U.S. labour law; the only chance to establish such a body was by a collective agreement between a legally recognized union representing the workers and company management. In the case of Volkswagen that meant that the UAW (or another union) had to be first recognized before the bargaining process over the conditions of such a works council could even begin.

Thirdly, the UAW had assumed that VW's willingness to meet and discuss labour issues was tantamount to accepting that union recognition would be forthcoming if the UAW could certify that it had support cards signed by over fifty percent of the workers. However, when the UAW produced those cards, VW management balked, demanding that a secret ballot election be held instead. That was a setback for the UAW, but not one that the UAW felt would destroy its chances of winning recognition. It agreed to an election and proceeded to negotiate the terms. In the run-up to the election in February 2014, the UAW felt confident of winning, because the support at the workplace for the UAW was stable. What was not part of the strategy and its implementation – and this was the fourth problem – was that the UAW had acceded to VW's demands that it refrain from community-support activities and not call on workers in their homes. So when the massive anti-union attacks mounted by the local business community, professional union buster associations, and Tennessean politicians came, its reliance on an institutional power-based strategy failed and it had no associational and societal power to fall back on.

As presented above, the loss of the election resulted in a change of course. The goal of cultivating a dialogue with Volkswagen and Daimler/Mercedes was not completely abandoned, at least not immediately at VW. But its usefulness for the union, even where it had seemed to work, seemed to be diminishing rapidly. Instead, the emphasis shifted to a more associational power-based approach by securing an organizational presence at both car plants that would enable pro-union workers to join and identify with the UAW. In line with UAW-IG Metall cooperation efforts, union members would also be kept up to date about relevant activities of the IG Metall in Germany and informed about the German system of labour relations and codetermination. In addition, the newly established UAW-IG Metall informal working group initiated research into mapping the presence of German auto suppliers located in UAW's Region 8, i. e., in the U.S. South. Here the original goal of »organizing the transplants« was to be extended to and refocused on the German suppliers. Finally, planning commenced on establishing a more continuous organizational link between the UAW and the IG Metall. This link, an office in the U.S. staffed by a person from Germany well-versed in the complexities of labour relations in both countries – and especially the auto industry – would be the main channel for transatlantic communication. At the same time, the IG Metall committed to providing a staff member in Germany to push for recognition and support of the UAW organizing drives at those company's plants in Germany. For the IG Metall, broadening the scope of organizational interaction and involvement in transnational trade union work to make it multi-level – beyond the nucleus of experts in the international departments – was a lesson provided by an ongoing network project in the IG Metall and was seen as being essential for generating effective support (associational power) for the campaign.

7. Results and Successes

The intensified activities in and between both unions in the year following the lost election at Volkswagen culminated in a formalized agreement and plan of commitment. After its ratification and several further months of planning, the UAW and the IG Metall officially opened the Transnational Labor Institute (TLI) in Spring Hill, Tennessee on November 19, 2015. In its member magazine, the UAW explained that TLI had two main goals to fulfill:

- Facilitate collaboration between the UAW and the IG Metall »to improve wages and working conditions for employees at German-owned auto manufacturers and suppliers in the U.S. South.

- Expand on the principle of »co-determination« between management and employees by establishing German-style works councils or similar bodies to promote employee representation.«[20]

20. UAW: New Models of Employee Representation to be explored, Dec. 7, 2015, https://uaw.org/solidarity-magazine/uaw-ig-metall-partnership-launch-joint-project/ (download Nov. 18, 2016)

The IG Metall concurred, adding that the TLI would also seek to »intensify the exchange of information between German and US trade unions. It will develop educational programs for trade unionists and the interested public in order to increase mutual understanding regarding questions of trade union policy and codetermination at the workplace.«[21]

The founding of the TLI ushered in a new phase in the relationship between the two unions. Both were under new leadership[22] ready to continue their support for the project. Building bilateral transnational cooperation by moving from sporadic to committed and institutionalized interaction over an extended period of time may seem to be a logical and straight-forward exercise, but in the context of international trade unionism it is rather unique – in particular coming in the wake of the ominous election loss at VW. As with the campaign partnership between the German service union ver.di and the Communications Workers of America (CWA) to gain union recognition at the U.S. telecommunications company T-Mobile (owned by Deutsche Telekom), the TLI was intentionally built on a partnership between only two unions. As a first step in a new phase of a transnational relationship, both unions argued that it was necessary to keep the partnership focused, develop functional working arrangements and avoid rivalries a multi-organizational structure could induce. In its goals and organizational structure the TLI moves beyond the coordinating unit serving the ver.di-CWA partnership. In fact, as part of a larger transnational project with a second pilot operation in Hungary, the TLI is the IG Metall's bridge to the UAW and its organizing drives in the U.S. auto industry. Measured by the level of personnel and material resources dedicated to this project in the U.S., the IG Metall has committed to breaking new ground in its transnational policy. For the UAW, the project is part of a broader commitment to organizing the auto industry in the U.S. South – a make or break situation for salvaging the associational power of the union.

As was stated at the beginning of this case study, the question of success in this phase of activities under consideration cannot be answered conclusively. The goal of organizing the foreign transplants, initially postulated by UAW president Bob King and later extended to include auto suppliers, was not achieved in this phase. It was this failure – above all signalled by the lost vote at Volkswagen – which put the drive to build a robust structure of transnational cooperation on a new and more anchored footing. Considering the difficulties of the task and the extent of employer resistance, this move was necessary.

8. Success Factors and Lessons Learned

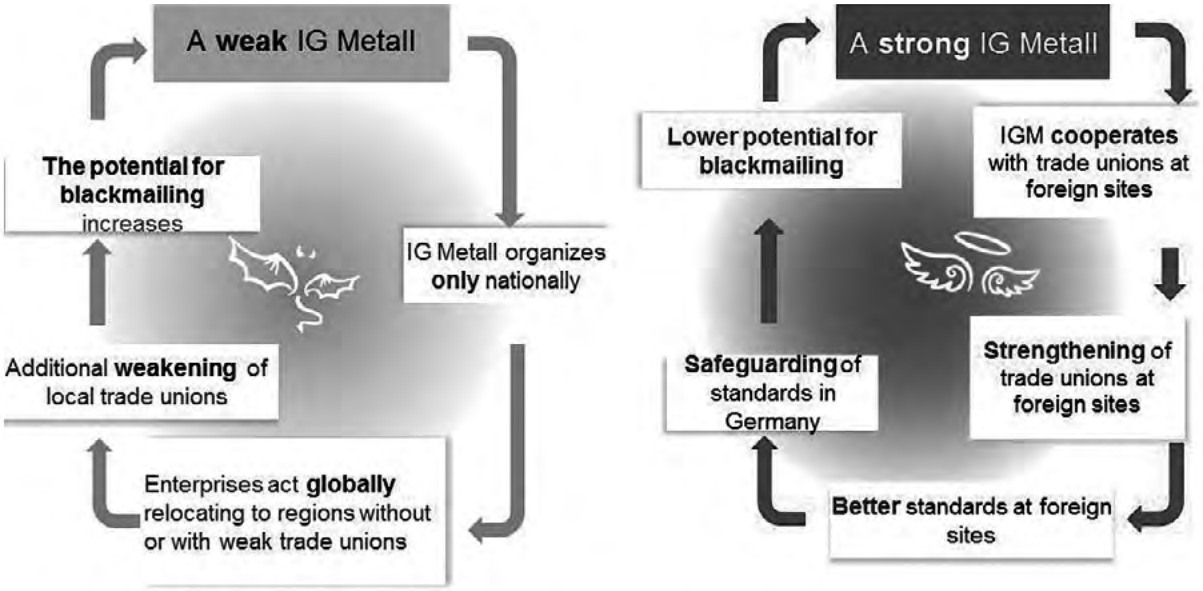
In the terminology of this case study, factors that led to success or to lessons learned are to be analysed in regard to making use of the available power resources – or developing the capabilities needed to make those resources available. Analytical categories such as these can structure, focus, and give meaning to the events that make up the story line; they enable the reader to put those events in a particular perspective, although events do not always lend themselves to making clean distinctions between the chosen categories. For example, one event may be made up of several processes that overlap in their explanation as being incidences of framing or articulating. As such, the following explanations of success factors in terms of the power resources mobilized and the capabilities used and developed will be partially redundant in its application of the analytical model to the events.

When Bob King assumed the presidency of the UAW, the union's associational and institutional power had been waning for nearly three decades. Not only did the UAW seem to be in an irreversible membership decline, but due to the foreign transplants' growing share of auto production and the UAW's inability to organize them and their suppliers, the union's collective bargaining coverage – a key part of its institutional power, was diminishing. The UAW had been severely weakened and any change in strategy or new attempt to revitalize the UAW had to take this into account. What power resources could it mobilize and how would the partners in this project – each on its own and jointly – build consensus (intermediating), define the agenda (framing) and construct multi-level interaction and understanding (articulation)? And lastly, what would be the learning processes involved and how would they be utilized?

21. IG Metall: IG Metall vertieft Partnerschaft mit US-Gewerkschaft, Nov. 20, 2015, https://www.igmetall.de/partnerschaft-ig-metall-und-uaw-17834.htm (download Nov. 18, 2016)

22. Bob King was succeeded by Dennis Williams in the summer of 2014 and Jörg Hofmann took over from Detlef Wetzel, Berthold Huber's successor at the IG Metall, in October, 2015.

Figure 3: »Vicious and Virtuous Circles« of Trade Union Strength



Source: IG Metall International Dept. 2014

Within the UAW the leadership could count on having a consensus of support for its goal of organizing the foreign automakers and for its proposed strategy of dialogue and cooperation built on the »UAW of the 21st Century«. Indeed, the need for this had been a recognized part of the UAW's policy since the 1980s. By making it the centrepiece of organizing, King's approach both acknowledged the union's waning associational power and offered a way to utilize its remaining institutional power. In reaching out to the IG Metall, the UAW also met with a positive response. Through this process of intermediating the UAW was able to diffuse criticisms based on the past and offer a way forward among the IG Metall staff members and works councillors who were concerned about strengthening transnational union cooperation. Over time, the International Department of the IG Metall was able to challenge the union's mainstream position of »better, not cheaper«[23] with its own arguments based on the idea of »vicious and virtuous circles« (see figure below). International solidarity is a basic assumption embedded in the history of unions around the world, but beyond that iron tenet, it was argued that it was in the self-interest of the IG Metall to support union organizing efforts in other countries. Strengthening those unions would combat »union-free zones« and corporate attempts at »blackmail« in collective bargaining resulting from their exploitation of workers in non-union locations. As such, each union brought its own perceived self-interest into this developing partnership and found common grounds of shared interests over the need for mutual support to aid in the organizing process and eliminate »union free zones«.

Intermediating outside the two unions, i. e. in terms of mobilizing societal or coalitional power beyond the UAW-IG Metall partnership was never seriously included in the strategy. Furthermore, where intermediating with the foreign automakers was involved, all attempts to establish social dialogue and a climate of mutual understanding were in the end rebuffed.

For Bob King and his leadership team it wasn't difficult to frame the revitalization of the UAW in terms of organizing the transplants. That was a message expected in light of the UAW's extensive loss of membership (associational power) and its weakened position in collective bargaining (institutional power). But how would the UAW do it? For the UAW, an essential element of fram-

23. This was a union policy slogan developed to promote more high-quality products made in Germany by union labour instead of trying to compete on the basis of cost with production in other countries.

ing the strategy was the emphasis on the UAW of the 21st Century, a union that stood for cooperation, efficiency and quality products. The UAW leadership argued that its traditional strongholds of associational power in the U.S. auto industry were inadequate and that the union was ill-prepared to meet the foreign automakers in a head-on battle. Portraying the UAW as forward-looking and as a potentially strong partner, the leadership was counting on raising interest at the foreign automakers and finding common ground for German automakers' cooperation with unions in the U.S.

In the IG Metall, that message resonated with its own understanding of »conflict partnership« and codetermination, but to be relevant as a basis for an ongoing and comprehensive transnational partnership, the IG Metall had to frame its own complementary message. For the International Department, and eventually the union leadership, being »better, not cheaper« in Germany was a strength that in a globalized world was of limited value, ending at the national borders. Even if the IG Metall maintained a high level of membership density in Germany, it was dealing with corporations operating with value chains around the globe and capable of organizing production wherever most conducive to profitmaking. With their technology, these corporations have the capacity and the incentive to be able to produce better wherever cheaper, in most cases avoiding unions, and as long as there were »union-free« zones around the world, the associational and institutional power IG Metall would be potentially threatened. The union had to begin finding approaches to changing this situation. A first step in this direction – to work together with the UAW[24] – seemed to offer a plausible way of testing the viability and conditions of such an approach.

However, following the election defeat at the Volkswagen plant in Chattanooga, the strategy had to be modified and thus required a revised framing and an expanded level of organizational commitment. Organizing the German automakers was not abandoned, but the focus was shifted to the (German) foreign transplants among auto suppliers in the U.S. South. Furthermore, while the message of cooperation and dialogue with the automakers has not been abandoned, its previous priority status has been toned down. In its place, organizing suppliers and, wherever applicable, strengthening societal and coalitional power as integral parts of this endeavour is emphasized more strongly.

The construction of multi-level interaction and understanding, linking the local and the global across space in the joint UAW-IG Metall strategy, was not clearly articulated in the initial phases of the partnership. In the first phase of the partnership, both unions entrusted the development of a transnational form of interaction to their experts in key staff and leadership positions. They were the ones with the most routine, they were the most informed, and their numbers were small so that the necessary building of trust with each new step and increased interdependency was a real possibility. Yet with mounting difficulties the need to tap further sources of support and activity within each union grew. The original strategy had been effectively challenged by the employers (and politicians), and as such, its articulation needed to be adjusted to meet the new conditions and to be able to muster a broader and multi-level base of support.

This was the plan behind the establishment of an information and educational centre in the U.S. South. As the link between the two unions, the activities of this centre would include fostering exchanges between workers from the same company at production sites in Germany and the U.S. It would conduct informational seminars; and it would keep both unions informed regarding relevant developments in both countries. In addition, the IG Metall dedicated a full-time staff person to coordinating and pushing the articulation among shop floor and local union representatives in Germany. The intention, it was argued, was to bring them into a proactive role in the project and to share its ownership with them.

For the partnership project as a whole, the commitment to a middle-range transnational cooperation was both a result of lessons learned from the past and a step toward seeking to learn for the future. For both unions, transnational interaction had consisted of formalized meetings of leaders, conferences of experts, and crisis management – none of which had proven conducive to strengthening ties and enhancing union positions. In this sense, embarking on a new trajectory of transnational cooperation was an expression of organizational learning and organizational flexibility. While its structuring as an ongoing commitment and its embeddedness as a recognized element of UAW and IG Metall policy grew

24. These arguments apply to the pilot project of the IG Metall in Hungary, which is also part of the whole Transnational Partnership Initiative in the union.

out of an understanding of past failures, its success as a »learning factory« for the future is yet to be determined.

9. A Final Note of Critique

The presentation of this case study has focused primarily on its successes because it does represent a milestone both in the specific instance of cooperation between the UAW and the IG Metall and in a more general sense in regard to transnational union partnerships. Criticisms have been voiced sparingly because it is difficult to judge the relevance of shortcomings as long as the project as a whole is still »work in progress«. The following reflections are made with this in mind.

One of the most important questions that needs to be raised concerns structural power and societal power, also in their relationship to associational power. When Bob King became president of the UAW, the union's associational and institutional power had diminished considerably. The union was still strongly entrenched at the U.S. automakers Ford, GM, and Chrysler, as well as at most of their major U.S. suppliers, but the growth of market shares of foreign automakers and the (global) shift of value creation and employment to the suppliers had undercut the UAW's bargaining position at the Big Three. It was a weakened UAW that set out under its new president to regenerate its associational power. For the UAW leadership, that regeneration could only be accomplished by an offer of institutional power-based »peace and cooperation«. Although King had threatened in his election speech to »pound« Toyota if it refused the UAW's offer, and to mobilize all one million UAW members and supporters, no preparations were made to give credence to such threatened action. Indeed, the course of developments at the VW plant in Chattanooga illustrate quite well, that worker/member mobilization was not part of the plan.

Although such a mobilizing campaign would have had an impact, it would be speculative to claim that it could have gotten off the ground. A number of factors make it seem unlikely, or at least extremely difficult, in particular the unregulated and heterogeneous nature of the vast U.S. labour market. But there seems to have been no consideration of such a step at all; developing conflict potential and direct participation of workers on the ground to complement the superstructure of partnership was not part of the plan. As Mark Anner has concluded from his research on several transnational campaigns in Latin America, »transnationalism, without mobilization on the ground, would be unable to articulate sustainable demands at the factory level.« (Anner 2011: 71)

In regard to associational and societal power, the framing, intermediating and articulating of the strategy and its goals stayed enclosed within the organizational hierarchies of the UAW and the IG Metall. And in the cases of Volkswagen and Mercedes, the opportunity to reach out to prospective labour-friendly supporters in the area was rejected in order not to pressure those corporate managers at Volkswagen and Mercedes with whom the UAW wished to negotiate and from whom they expected recognition. That left the partnership vulnerable to the whims of those corporate managers and the massive attacks of anti-union business interests.

These questions and issues are part of the experiences accrued in the phase of the project under study. And as the project becomes operational and moves forward, their relevance deserves renewed consideration. The success in establishing an ongoing and committed partnership is a sound basis for growing transnational associational and institutional power. But it will also need a readiness to learn from the past and reflect on all possible strategies and power resources that can be mobilized toward attaining the postulated goals.

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