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Christian Dufour, Gregor Murray, David Peetz and Charlotte Yates

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# Rethinking collective representation: introduction

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## Summary

This special issue of *Transfer* concerns the analytical frameworks we use to understand trade unions and their actions. Focusing on the conditions for union renewal, it explores key ideas that might stimulate our thinking about union revitalization and future forms of collective representation. The challenge to each set of authors is to put forward a conceptual framework that will help readers to rethink their own understanding and narratives about collective representation. These concepts include politics, power, legitimacy, democracy, individualism and collectivism, the framing of gender and womanhood, and climate change.

## Keywords

Trade unions, collective representation, union renewal, politics, power, legitimacy, democracy, individualism, union organizing, gender, climate change

The objective of this special issue is to explore ideas that might stimulate our thinking about union revitalization and inform the ways that we seek to compare experiences of union change and

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renewal. Although there are many workplace, industry, union and country studies of efforts at union renewal in the context of the sweeping changes taking place in workplaces around the globe, there is remarkably little conceptual work.

The particular focus is therefore on key concepts for collective representation and union renewal. The intention is to move away from a justifiable but often overly narrow emphasis on the quantitative and qualitative dimensions of unions in crisis in order to consider more fully the experience of and conditions for trade union renewal.

The articles in this issue feature a variety of authors, in terms of both their approaches and the contexts to which they refer. They share, however, a rich tradition of union research. Indeed, it is their empirical work that feeds the development of the concepts that they believe are likely to be central in our thinking about future forms of collective representation. We asked each author (or set of authors), in the light of their current research findings, to focus on one concept that, in their view, is likely to be central to future forms of collective representation. These include politics, power, legitimacy, democracy, individualism and collectivism, the framing of gender and womanhood, and climate change. These contributions were further stimulated by rich and multiple exchanges between the authors over the last several years.

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The problems associated with traditional models of collective representation are by now well rehearsed. Rooted in older organizational forms and predicated on assumptions about the relative ease of framing and aggregating worker interests, unions in different national contexts have been seeking to come to terms with the multiple faces of the new labour market.

The challenges remain daunting. Long-term movements in the types of jobs people do and in the industries in which they do them, as well as the socio-demographic characteristics of these workers and the values they bring to work, erode union representativeness. They also raise questions about unions' ability to move into new job territories and to reflect the diversity of people at work. Indeed, union organizations are often cast as an atavistic manifestation of an industrial past: 'pale, male and stale' according to a popular vernacular and scarcely permeable to identity groups such as women, visible minorities and young workers who are changing the face of the labour market. Even though growth in female membership is compensating for relative declines in male membership in many national contexts, ensuring a leadership role for women in many union organizations remains a challenge. The inability to connect with young workers is a more generalized phenomenon that has long-term implications for union sustainability. The multiple and combined effects of new technologies and changes in work organization, the proliferation of new forms of employment, the internationalization of production and services and the pursuit of labour flexibility are changing the organizational topography for union action. It appears that collective union actors are often ill equipped to deal with such change.

Drawing on the substantial body of analytical and normative research on union revitalization or renewal (most notably from Anglo-American countries such as the United States, the United Kingdom, Canada and Australia), there is now much comparative and meta evaluation of union actors in the light of the many challenges they face. This gives rise to tensions in the literature: between 'big bang' theories of structural change and an emphasis on incremental experimentation; between a top-down focus on strategy and leadership and bottom-up pleas from the grass-roots for greater democracy; between the importance of internal resources and of external alliances; between calls to transform society through social movement unionism and an emphasis on workplace partnerships to contend with competitiveness. Because the results of the many experiments

taking place are so uneven, so often *underwhelming*, it is important to enlarge our focus towards an understanding of collective actor capacity and its links with wider changes at work and in society.

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What are the analytical frameworks we use to understand trade unions and their actions? Current thinking is so consumed by the so-called crises of trade unions, often heavy in the attribution of causality to external factors. Faced with often devastating diagnostics of diminished union membership and capacity, it can be tempting not to push the analysis any further. Yet it is important to keep in sight the causes and effects of change. Our contention is that it is essential to pay attention to how we conceptualize the experiences of union crisis and renewal, as much as it is important to explore actual changes in labour movements. Attempts at renewal, with their setbacks and successes, are as important for understanding the current state of unionism, as are the inevitable and often difficult comparisons between past and present. We have therefore opted to focus on what we believe are key concepts likely to inform both our understanding of the current state of trade unionism and of the possible conditions for its renewal. In so doing, we hope to identify avenues for the development of collective representation and also to explore these avenues, possibly drawing out complementary and practical consequences for union strategies to transcend their crisis.

We can identify at least three starting points that are shared by most of the articles that follow.

First, while not denying the importance of context and the often epochal nature of changes facing union organizations in different national contexts, the focus of each contribution turns to internal factors affecting the capacity of unions to renew. As opposed to a simple reading of the material changes in their environments, it is important to analyze the links and strategies of unions with regard to their economic and social environments. In this sense, unions are above all social rather than economic agents and it is the dynamics of this 'social' that is at the heart of their capacity to act.

Second, this means that union actors are not merely the expression of some sub-set of environmental factors (societal, geographic, economic, technological, etc.). Of course, unions reflect and refract these forces but they are also strategic agents, acting upon themselves and their broader operating environment. It is these dimensions of union action that run through each of the contributions. Each article points to a strategic space that is opening for unions to take action but in relation to which we need more conceptual work to understand how, if and under what conditions union renewal will take place. As each of the contributions make clear, neither voluntarism nor determinism will help us understand the new terrain in which unions operate. Rather there is simply the space for experimentation and action that is in itself the essential condition for union renewal. This means that unions as social actors are in part the products of their own invention.

Finally, renewal projects for unions are necessarily contested. This entails the confrontation of ideas and the organization of challenges to organizational routines and power structures. The renewal of collective representation is likely to be an uneven and often fractious process from which new framings emerge and assert their hold. Each of the articles that follow seeks to contribute to that process.

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The history of most trade union movements is intertwined with political parties. Unions were long seen as a branch of the labour movement; just as socialist and social-democratic parties were seen as extensions of the union movement. The evolution of this relationship is not merely an artefact of history but a living and often unconscious heritage on which contemporary union action has been constructed. In their argument for the rehabilitation of *politics* in industrial relations, Richard Hyman and Rebecca Gumbrell-McCormick (2010) provide a trenchant overview of the parlous

state of union-political party relationships as a vector of the diminished role of politics in union action. In their overview of this issue in ten European countries, they note a diminished political influence, itself an expression of a general weakening of unions' organizational capacity. They emphasize how so many union organizations in Europe are locked into old political identities and allegiances which have often become quite meaningless in their disjunction with the realities in that they are disconnected from much of contemporary social change. Returning to the question of union purpose, they highlight the need to go beyond the exigencies of daily workplace representation in a political project that counters neoliberalism, that seeks complementarities with radical social movements in the search for enhanced power resources and that makes the connection between progressive national and international political strategies.

*Power* is at the core of current interrogations about union capacity. Unions exist because they have constructed themselves in a relationship of power in the societies where they are present. Christian Lévesque and Gregor Murray (2010) argue in their contribution to this thematic issue that it is this historic self-construction of union power that is the central obstacle to union renewal. The current crisis is one of union path dependency in the way that they constructed their own capacity over time. As external conditions change, there is clearly a need to revitalize union capacity. This is easier said than done. Lévesque and Murray argue for the need to explore the key dimensions of union capacity and how these dimensions interact in different permutations of enhanced and diminished union capacity. In their view, the union project must be an effort to renew the resources and strategic capabilities that are central to an understanding of relative union power. Towards this objective, the authors advance a practical analytical framework to conceptualize key resources (internal solidarity, network embeddedness, narrative and infrastructural) and strategic capabilities (intermediating, framing, articulating and learning). In particular, they argue that it is these strategic capabilities that activate and modify union resources. The central union project must therefore be self-experimentation and action in an effort to reconstruct union capacity.

A central issue haunting contemporary unionism is its relative *legitimacy*. Christian Dufour and Adelheid Hege (2010) advance a devastating diagnostic of this crisis of legitimacy. Of course, legitimacy is at the heart of union action. For Dufour and Hege, it is dual sourced: externally, from institutional recognition; internally, in the relationship between those who are representing and those who are represented. Drawing on a wide range of European examples, their analysis suggests that problems of legitimacy are not external; in fact, most of the institutions that reflect external legitimacy remain in place, despite diminished union capacity. The problem is rather one of internal legitimacy and it is in that direction that union renewal projects must turn. In their view, this is a much more demanding path because it entails connecting with a variety of groups, forging an identity among competing conceptions and representations of groups of actors at play, and ensuring that this new forged identity (and the hierarchies that it entails in the way that it selects interests, promoting some to the detriment of others) somehow connects with broader trends in the society. It is through this complex process of internal construction that unions are likely to rekindle their lost internal legitimacy.

It is axiomatic that unions are voluntary organizations founded on a bedrock of democracy. Union democracy is certainly at the heart of many debates about union renewal. Kim Voss (2010) asks what *democracy* has to do with union renewal. This conceptual take is of particular interest in the United States where there are passionate and even virulent debates between the proponents of bottom-up and top-down approaches to change and renewal in the labour movement. In the one corner are the proponents of a deliberative democratic process that can engender a larger social movement. In the other corner are the proponents of finding new sources of organizational leverage. For example, the effort to engineer international coalitions and even cross-border mergers of like-minded unions is an integral part of this same conception of change in unions.

As Voss makes clear, this is not a new debate. Democracy has long been at the heart of debates over trade union purpose and, as argued by Voss, this is likely to be even more the case in the current context. Drawing on examples from and debates within contemporary unionism in the United States, Voss explores how divergent conceptions of union democracy are in play and the sometimes quite vigorous confrontations that these engender in the perspective of renewing collective representation.

One of the most prevalent choruses among union activists and leaders is that their members have somehow changed, that they do not exhibit the natural collectivism of previous generations of workers. The article by David Peetz (2010) offers a direct challenge to such a nostalgic representation of the current dynamics of union representation. He suggests that the evidence of some inexorable slide towards *individualism* is altogether less than convincing. He draws on a variety of international survey data sources to show that the death of collectivism is much exaggerated. In fact, collectivism has proved rather resilient in the face of multiple onslaughts and particularly in the light of the neoliberal reorganization of the employment relationship. Unions are clearly organizations founded on notions of collective and individual identities and interests. Peetz offers a framework to understand this inevitable combination of individualism and collectivism. In particular, he highlights how this collectivism must be founded in renewed union structures and practices. Once the rise of individualism is thus discounted as an easy explanation of diminished collective capacity, union leaders and activists must nonetheless address this issue of diminished collective capacity. What then explains the problems readily recognized by union actors? Peetz points to the need to examine the adaptation of union actors themselves to the construction of their collectivities.

Multiple diagnostics point to the shrinking perimeters of union representation. This issue is not so much a quantitative one – though that is also important in some national contexts – but rather that the contested representativeness expresses profound fractures with the people at work. The central issue, as also developed by Dufour and Hege (2010) in this special issue, is one of exclusion: exclusion of the most vulnerable in terms of their job insecurity; exclusion in terms of international migration where language, skin colour, customs and beliefs and the simple realities of the relative poverty inherent in recent migration from countries of the South are all factors that contribute to a sense of difference; exclusion in terms of the gender contract because it is women, who also play a different role in the home division of labour, who somehow constitute the exception and not the norm. These exclusions are often compounded moreover because they intersect in variable but pernicious geometries to constitute fault lines between those who are the insiders and those who are not.

The article by Charlotte Yates (2010) seeks to grapple with these connections through an understanding of the *framing of gender*. Often located in areas of the economy that intersect with their social roles in the family economy and that coincidentally are less likely to be unionized, the place of women in unions clearly constitutes a huge challenge for union renewal. Drawing on the case of a union organizing campaign in Canada, Yates uses the concept of framing to explore how unions offer varied understandings of the differences between women and men, with implications for the strategies unions pursue. Simply put, the hitherto dominant narrative stock does not provide unions with ways of connecting to women or overcoming the labour market structural barriers to their membership and participation. Union renewal requires a reframing of workers, their lives and their connection with their union (or potential union) and society. Wage- and salary-earners are never just workers or employees, they are women, ethnic minorities, mothers and migrants. Their private lives cannot be disarticulated from the jobs that they hold; their multiple social roles combine most often differently for women and for men. Unions are thus obliged to find new ways of justifying their initiatives and, in the first place, constructing new forms of collective identity and solidarity.

This task is all the more complex because of the need to build support amongst potential allies, members, consumers and users of public services.

Current union policy advocacy has to contend with a huge paradox. Despite a tendency towards accommodation, unions have generally been strong advocates of an historical critique of capitalism. This account of socio-economic development includes that labour is treated as a commodity but is in fact human agency, that the market is really a set of social relations of power masquerading as an invisible hand, that there is a marked tendency towards periodic economic crises and that, for all of these reasons, markets require social regulation underpinned by political intervention. In the wake of the financial crisis of 2008–2009, one might think that such a critique would have generated much popular support and be at the heart of current policy debates but it is difficult to argue that this is in fact the case. There appears to be a conviction problem and a disconnectedness in the hold that this critique has on popular imagination. The question would seem to be: if the classical critique of capitalism has lost its way, is it possible to invest in new economic issues – like *climate change* and sustainable development – in order to reframe the way that we think about socio-economic development and the union role in that development.

This issue is tackled in the article by Darryn Snell and Peter Fairbrother (2010). With its extreme vulnerabilities to climate change, where the impact of ozone holes and changing weather patterns offers the prospect of devastating social impacts, there would seem to be a strategic opportunity for labour to redefine its purpose within this larger socio-economic debate. Snell and Fairbrother explore the different possible seams for such a changed role – stemming from defending jobs in the context of restructuring, from promoting green jobs and skills, and from forging coalitions around regional and community development projects. But they also highlight the complexities of such a shift – of the contrasting interests at play and the difficulty of forging identities in these struggles. Yet, in their view, climate issues are an epochal change that necessarily engage union members in debates about their purpose and conflicts between the vested interests inherent in the defence of often environmentally unfriendly jobs and the social justice of sustainable jobs. They do, however, detect a potential synergy as the notion of decent jobs will increasingly expand to embrace an inclusive social purpose as both green or environmentally sustainable and respectful of fundamental labour rights. On the basis of the still fragmentary and necessarily contradictory evidence, it is in their view the search for that synergy that promises the renewal of a more inclusive union purpose.

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In a related forthcoming book project (Murray and Yates), also part of this initiative, a wider range of contributors will offer an even greater variety of conceptual takes expanding and enriching the debate. We were necessarily constrained in this special issue to choose just a few of the conceptual avenues identified, but want to acknowledge on behalf of all of the researchers involved in this project how each contribution has been enriched by the continuing exchange between all of the collaborators in this project.

This special issue of *Transfer* once again offers a partnership in a joint special issue of the French-language *La Revue de l'IREs* of the Institut de Recherches Économiques et Sociales in France and the European Trade Union Institute. We wish to thank our colleagues at *Transfer* and *La Revue de l'IREs* for their collaboration and support in this initiative.

Each of the following articles explores the conditions for union renewal. Each set of authors has been challenged to advance their conceptual take in a stimulating and accessible way that will help readers to reframe their own thinking and narratives about collective representation. If readers can take away ideas that stimulate their own thinking, the objective will have been achieved.

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