Workplace representatives: strategic actors of union renewal?

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ABSTRACT

Workplace representatives (shop stewards) provide insight into union transformations. This article explores the renewed research interest in terms of the representativeness of unionism and of workplace representatives, the complexity of the sites of representation and employer strategies, the search for new references and the centrality of workplace representatives in union renewal strategies.

The causes of decline in union membership are readily attributed to a variety of factors: the dual shift in forms of employment from goods to services and from full-time permanent to precarious and temporary status; the increasing diversification of the workforce and the apparently greater sway of individualism on the values of people at work; change in the organisation of work and management systems; and finally, the fear for job security in a context of restructuring, financialisation and globalisation, which can mean that muted acquiescence is often seen as the ‘least worst’ option for employees and workplace unions seeking to weather the storm.

Multiple strategies are on offer for unions to counter this decline. These include a greater emphasis on organising and new types of recruitment, mergers and the better utilisation of scarce resources, the rethinking of bargaining and servicing structures in response to the reorganisation of production and services, improved communications strategies that focus on the importance and value of trade unionism, the shift to community and international alliances for bargaining and public campaigns, a move to non- and para-union forms of representation, and so on. The prognosis for these strategies seems, in turn, to depend on larger contending visions of union futures. For some, the success of the different strategies advocated is contingent on a drastic change in social and political conditions. For others, these strategies are all condemned since the golden age of trade unionism is over. For yet others, the empirical evidence on the successes and failures of these strategies and their possible permutations is still uncertain.

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It is this latter approach that we believe justifies the collection of articles in this special issue of the *Industrial Relations Journal*. Our focus is on a neglected but vital actor—that of frontline workplace representatives. These employee representatives have a variety of labels: shop stewards, workplace union representatives, union delegates, employee representatives, workplace activists, Betriebsräte, délégués du personnel, works council representatives and so on. Whatever the terminology, which differs from one national system of representation to another and even between industries and firms within a single country, workplace representatives are in an intermediating position within the employee-union-employer nexus.

Our point of departure is that workplace representatives and the intermediary roles that they play are not merely an expression of a given set of institutional requirements (German works councilors v. French works’ committee representatives v. British shop stewards) or of a certain type of scripted union orthodoxy (moderate or militant, reactive or proactive). While such generalisations have much currency in the international literature on voice regimes and workplace representation, they rarely withstand detailed empirical scrutiny. The roles played by workplace representatives will inevitably reflect some of these larger influences but the actual practice of representation is more likely to be defined by the particular constraints that characterise a workplace and by how these workplace representatives contribute to the understanding of those constraints and react to them.

Workplace representatives are typically the face of the external union for both union members and employees at a worksite. They also represent the union to the employer at that worksite. Workplace representatives also give voice to union members and employees as expressed to both the employer and the external union. And workplace representatives also often present the point of view of the employer to both union members/employees and to the union. In other words, workplace representatives are at the centre of a complex set of multi-directional triangular relationships in which their particular type of mediation comes to define their particular brand of representation. Sometimes, forms of union- and non-union representation coexist, as in the dual-channel regimes but increasingly in the UK as well. Sometimes, formal union representation is entirely absent. Workplace representatives can act alone but more often they do so as a group or team of representatives. Workplace representatives can be more or less inventive, reflecting their particular sets of resources and capabilities and opening up or closing down space for employee representation.

None of this is predefined. The representatives’ links with employees may be strong or weak. Their relations with the employer may be marked by autonomy or dependency. The representatives may be strongly articulated with the external union or not at all, irrespective of whether they are nominally representatives of that union. Our own empirical workplace observation points to how a group of workplace representatives is ultimately defined by the particular types of networks that it builds and maintains, by the quality of the relationships among the workplace representatives themselves and by how well they function collectively.

Workplace representatives must deal with relations that are becoming ever more complex. They must be sensitive to the changes in the identity of employees (who they are in terms of their diversity, their values, their wellness at work and their relative employment security) and the nature of the jobs they do (levels and types of skill, importance of intrinsic rewards). Representatives are being asked to intervene on issues that are often more technically challenging (psychological harassment, workplace...
equity, restructuring, technological change, intra-firm performance management, incentives-based remuneration, etc.), which can push them towards a kind of professionalisation of the roles that they play. Workplace representatives can then be caught in a vicious circle of non-renewal for who would want to take on the heavy burdens of such professionalised representatives when the step from employee to representative can seem so daunting. Given the intensification of different forms of intra-firm competition, work sites are under intense pressure and representatives can be tempted to ‘knuckle down’ and focus on the local, effectively shutting out larger union influences. Moreover, human resource departments and various external consultants can also offer a range individual services that compete with those traditionally assured by workplace representatives. Previous ways of defining relationships with the employer—paternalism, head-on confrontations, etc.—are also being transformed.

Union actors—internal and external to the workplace—are also changing. They certainly cannot ignore unionism’s numerical decline in key sectors and apparent weakening political influence overall. They are therefore less likely to offer the kind of holistic projects that sustained previous generations of militant workplace activists and which make the boundary between union and non-union workplace representatives even less apparent. Yet, given the pressures highlighted above and the intense contradictions of their own workplaces caught between the promises of participation and well-being and the stressful realities of performance pressures and managerial incoherence, workplace representatives are not immune to the need for renewal and do look to such external references for guidance. Workplace representatives are thus exposed to a situation that simultaneously involves a void in their loss of external references and a degree of autonomy in the new opportunities to redefine themselves. Yet, it is not a simple matter to break from their prevailing ‘referential unionisms’ (Murray et al., 2010).

Comparative empirical research offers much potential for understanding the rich variety of practice on the part of workplace representatives and, through the lens of this comparative analysis, how these variations come about and how they may or may not evolve in the future. The very diverse, and even contradictory, practices of these workplace representatives certainly highlight the difficulties involved in these representative processes. Because so many of the so-called union renewal strategies appear to rely on this level of representation, such analysis provides a window of opportunity for assessing potential strategies for developing employee representation and trade unionism. Empirical studies of workplace representation that support the pessimism of some of the larger interpretative frames point in one direction. More mixed results potentially open up the space for more grounded analysis of various renewal strategies.

This is why workplace representatives and the roles they play constitute veritable laboratories for understanding the transformations of unionism. It is through them that we can understand the presence or absence of workplace representation and of its relative dynamism because they constitute the means for transforming unionism. Unions focused on their own organisational transformation projects invariably emphasize the importance of mobilising workplace representatives and of ensuring that their workplace union delegates are not ensnared in the management of strictly local interests. Indeed, the ability of employees to intervene in their workplace often depends on their relationship with their workplace representatives and on the ability of those representatives to create a sense of collectivity, often in difficult circumstances. Moreover, workplace representatives also provide a fascinating methodological perspective on the transformation of regimes of representation and voice at work.
We first highlight research traditions on workplace representation, then identify key themes and challenges that emerge from more recent studies of workplace representatives.

1 RESEARCH ON WORKPLACE REPRESENTATIVES

A first generation of studies primarily sought to situate these workplace representatives in trade union sociology and employee representation. This was how Sayles and Strauss (1953) presented their early 1950s work on ‘the local union’ in the United States. It was really about trying to ascertain the dynamics of a emerging representation regime. The UK has certainly provided one of the richest research traditions on workplace representatives because wage drift and its link with macroeconomic policy was such a central concern. The 1960s research studies both preceding and generated by the Donovan Commission focused on the role of shop stewards and the dynamics surrounding this role (see, e.g. McCarthy and Parker, 1968) in what Brown and Wright (1994: 158) have subsequently labelled an ‘almost obsessive concern with the details of workplace bargaining’. The widespread diagnostic first advanced by Allan Flanders pointed to the disarticulation between the informal bargaining system that operated on a daily basis in workplaces and the more formal industry-wide and firm-level bargaining system. Subsequently, in the 1970s, Boraston et al. (1975) explored the relationships between unions in workplaces and external local union organisations. Beynon’s (1975) and Batstone et al.’s (1977) now classic ethnographic studies detailed descriptions of the varied profiles and roles of union representatives in major manufacturing plants (see also Terry, 1977). Thereafter, it became a preoccupation to replicate the robust role of stewards identified in the private sector in strategies to develop a public sector workplace representative capacity (Terry, 1982). From the 1980s onwards, in the context of economic pressures and the neoliberal policies pursued by the Thatcher government, researchers sought to grasp the decline of shop stewards (Terry, 1986), whose weakening revealed more profound political changes (see also Beynon, 2011), but whose activation could represent the possibility of renewal (Fairbrother, 2000).

On the European continent, fewer studies have focused on workplace representatives. Ethnographic research was more directly concerned with the sources of cooperation, conflict and control and their interaction in workplaces. Where workplace representatives made an appearance, they did so in a supporting role. Among the themes explored were labour control, Mitbestimmung (co-determination) in Germany and productivity (Bernoux et al., 1973; Bosch, 1997; Bosch et al., 1999). In the 1980s, Greifenstein et al. (1993) compared the introduction of direct participation in France and Germany. They referred to the possible disappearance of workplace representatives, as did studies undertaken by the Dublin Foundation (Sisson, 2000). Labour consciousness and activism often served as frameworks of analysis (Accornero, 1973; Beaud and Pialoux, 1999; Di Ciaula, 1978; Ion, 1997; Kern and Schumann, 1970; Mouriaux, 1986; Touraine et al., 1984).

European studies on the institutions of representation, their role and development (Müller-Jentsch, 1986) and international comparison (Leisink et al., 1996) tended to replace the analysis of the representatives themselves. Attention increasingly focused on the subjects that workplace representatives had to deal with (negotiations, restructuring processes, technologies, co-determination, working conditions), which varied according to the dominant flavour of the social and economic period. Studies
examining the extent of unionisation did not take workplace representatives into account (Ebbinghaus and Visser, 2000; Visser, 2006). In statistical surveys on the structures of representation, workplace representatives were seen as respondents, able to provide relevant information, but were not the focus of the research (Enquête Réponse in France; WSI-Betriebsrätebefragung in Germany). In a context of diminished trade union presence, a number of studies focus on the disappearance or, alternatively, the resilience of representative workplace structures, without really looking more closely at what workplace representatives actually do (Hassel, 1999; Wolff, 2008). Yet, when these workplace structures of representation were actually examined in detail, workplace representatives often emerged as a key explanatory variable (Bonafé-Schmitt, 1981; Carrieri, 1995; Combe, 1969; Dufour and Hege, 2002; Fürstenberg, [1958] 2000; Hege et al., 2000; Kotthoff, 1981; 1994; Montuclard, 1963; Regalia, 1984).

There has also tended to be a weak theorisation of the question of workplace representatives in the research literature. In debates about unionisation, notably in North America and the UK, the role of workplace representatives tended to be conflated with the issue of union commitment and activism. Or, workplace representatives were quite often overlooked entirely in the European literature in favour of an interest in the union as an organization, in which case the workplace representatives either entirely disappeared or were subsumed in the role that they were deemed to play.

2 RENEWED INTEREST IN THE CONTEXT OF A CRISIS OF UNIONISM

Over the last 15 years, several factors have helped draw attention to the importance of workplace representatives. The starting point is that to understand current transformations in union practice, it is necessary to scrutinise the particular role played by workplace representatives. The articles presented in this special issue highlight a number of cross-cutting themes that link with other studies. We briefly highlight five of those themes.

2.1 Crisis of representativeness of unionism

Trade unionism is in difficulty across the globe, whether in terms of overall union density, union presence in new segments of the economy or the legitimacy of unions and their capacity to mobilise workers. In most of the Anglo-Saxon countries (notably Australia, Ireland, UK, the United States and, to a lesser extent, Canada), unions have suffered considerable membership losses, had to contend with challenges to existing systems of collective bargaining and been largely in a defensive mode. These challenges have led to in-depth reflection on both internal and external organising, which has propelled workplace representatives to be a major concern. Studies that focused on union organising or the ‘organising model’ pointed to the need to adopt a union-building approach by releasing union resources for the external organising of the unorganised through greater self-servicing by unpaid activists (i.e. workplace representatives) and by linking internal and external organising in the development of local union leadership (Bronfenbrenner et al., 1998). Because the model was predicated on vibrant workplace union organization, the role of union education and training of workplace representatives has featured prominently (Hurd, 2004; Peetz and Pocock, 2009; Simms et al., 2012; Waddington and Whitson, 1997; Yates, 2005).
The crisis of union representativeness is also manifest in continental Europe. In Germany, the growth of precarious employment and the insider-outside divide that characterises an increasingly dualised labour market (Thelen, 2012) has challenged a system of collective bargaining that appears to have lost its normative capacity but, all the while, continues to cover a high proportion of employees. In a variety of countries with a dominant social democratic tradition, the erosion of previous party–union political alliances has prompted many unions to tone down their own demands in order to avoid making things worse (Hyman and Gumbrell-McCormick, 2010). In France, the apparently strong institutional presence of unions at the level of industries and firms cannot disguise their weaker presence on the ground and open challenges to their representativeness (Andolfatto and Labbé, 2009; Dufour and Hege, 2008). And in the more highly unionised Nordic countries, the continuing move to more decentralized bargaining has redirected attention to the importance of workplace representatives and, indeed, of the pivotal role of shop stewards in this new ‘organised decentralization’ (Ilsoe, 2012; Sippola, 2012). The common concern running through these different national cases is that of the relationship between unions and their members and the need to search for a renewed capacity to act in changing circumstances (Dufour and Hege, 2011).

2.2 Crisis of representativeness of workplace representatives

Has the profile of workplace representatives kept pace with the changing composition of the workforce? On the basis of evidence from a number of countries, this seems to be a significant challenge. This discrepancy in sociological characteristics is accompanied by a deep gap between the biographical and occupational trajectories of representatives and potential union members. The article by Dufour and Hege (in this issue) explores how differences in gender, age, occupational status and permanence of employment combine to weaken the modes of socialisation on which union structures and their persuasive capabilities were based. This is also amply demonstrated by Artus in her article in this issue. Drawing on her study of the growing zones of precarious employment in private services in Germany, and contrary to stereotypes of the institutionalisation of workplace representation in that regime, Artus highlights the challenges faced by workplace delegates in these zones where workplace representation no longer plays a traditional driving role and is largely divorced from the strongly ensconced representation elsewhere. In the face of management hostility, the often fragile successes of these precarious workplace representatives can be attributed to their strong personal commitment, their ability to transcend the prevailing logic of rational economic, exchange and the support of unions well ensconced elsewhere that do not always understand their operative conditions. This gap is an ongoing challenge to the legitimacy of workplace representation.

This diversification of the workforce also opens up new social spaces, such as those related to the concerns of diversity, human rights, racial and gender equality and sexual orientation. Unions, more globally, and workplace representatives, more locally, are sometimes reluctant to take up these issues. More tellingly, more diverse workplace representatives often find it difficult to ensure their presence (Bennett, 2010; Briskin, 2011; Hunt and Haiven, 2006; Kirton, 2006; Moore, 2011; Yates, 2010). Sometimes, the established groups of delegates do not leave enough space for aspirations to modernise outdated and unsuitable models of representation; with consequences for intergenerational relations (Johnson and Jarley, 2004) or interracial or
inter-ethnic relations (Jefferys and Ouali, 2007; Tufts, 2006; Wrench, 2004). These divides can be seen in the same workshops or offices where temporary workers replace one another in succession alongside permanent employees, with both parties performing the same tasks (Béroud and Bouffartigues, 2009). While the resulting tensions within and between the groups of employees do not make it easy for candidates for individual or collective representation to emerge, Cranford (2012) highlights in her study of the gendered nature of shop steward representation in the Justice for Janitors campaign in Los Angeles how the specific recognition of gender inequality (‘cross-gender mutual defence’) acts as a point of departure for fostering solidarity between men and women. Bryant-Anderson and Roby (2012) similarly weave the interface of both race and gender into the constitution of new models of steward leadership.

Drawing on research conducted on workplace union representatives in the education sector in Quebec province, Canada, the article by Catherine Le Capitaine, Gregor Murray and Christian Lévesque (2013 in this issue) seeks to understand the dynamics of empowerment and disempowerment of female and male workplace delegates. Their results suggest that empowerment and, conversely, disempowerment are related to particular resources and capabilities and not to their particular workplace context. Delegates, be they men or women, who participate more frequently in external union forums, who are more knowledgeable about the collective agreement and the union and who are able act as a relay between the union and its members, are all more likely to feel empowered. However, other predictors of empowerment vary between men and women. These include training and the ability to take issues to local management, which are more important for women, and intense information exchange through individual and small group meetings, which is more important for men. These results also point to the need to build gendered understandings of workplace representation into union policy and practice.

### 2.3 Increased complexity of the sites of representation and diversification of employer strategies

The decentralisation towards the workplace of some aspects of bargaining towards in both private and public sectors turns union attention to the role of workplace representatives. Workplace representatives and employees also face more sophisticated and often contradictory employer strategies that both target the more intensive use of labour and seek to mobilise skills through the reorganisation of jobs and direct employee involvement. This transformation of the organisation of work prompts union repositioning, as for example in forms of partnership or the search for countervailing power. Some observers view this as an opportunity to develop new roles for workplace representatives (Frost, 2001; Kristensen and Rocha, 2012; Müller-Jentsch and Seitz, 1998; Rocha, 2010). Others detect a greater distancing between workplace representatives and employees (Bramble, 1995; Danford et al., 2002; Fairbrother, 2000; Kotthoff, 1998; Rehder, 2006; Rittau and Dundon, 2010) or complex work on self-identity as the workplace representatives work through their new and often conflicting roles (Harrisson et al., 2011). The role of union workplace representatives can also be challenged by modes of direct employee participation (Greifenstein et al., 1993; Juravich et al., 1993) and by the emergence of non-union forms of representation (Gollan and Lewin, 2013). The multiple challenges posed by changes at the level of the workplace such as restructuring, offshoring, new production processes, inter-site benchmarking and managerial unilaterality appear to force workplace
representatives into often difficult tradeoffs such as a reduction in staff or unbalanced concessions, at the risk of undermining employee cohesion (Beaujolin-Bellet and Bobbio, 2010; IRES, 2005).

At the same time, the internationalisation of the organisation of production and services in multinational firms has increased the number of sites where workplace representatives intervene. The most notable example is that of European Works Councils (Greer and Hauptmeier, 2008; Waddington, 2010; Whittall and Kotthoff, 2011), but examples of local union representatives being engaged in contact with other sites is not limited to particular institutional forms (Lévesque and Murray, 2010).

Other new fields of intervention are also emerging, created either by social demands such as those related to inequality, harassment, stress, suffering and lack of well-being at work (Rhéaume et al., 2008; Knudsen et al., 2011), work–life balance and the environment (Snell and Fairbrother, 2010), or institutional changes, such as the emergence in Great Britain of learning representatives in charge of training development (Wallis et al., 2005) and of workplace equality representatives to improve equality policies and practices (Bacon and Hoque, 2012). In these emerging spaces, the roles of workplace representatives are under construction and are not yet stabilised. They are competing with formerly established commitments such as participation in bipartite or multipartite joint committees or sector based (industry based) and territorial bodies.

The greater prevalence of non-union employee representatives is also a source of increased complexity for workplace representatives. If the coexistence of union and non-union employee representatives is well established in dual-channel representation regimes, such as Germany and France, many of the factors identified above lead to a questioning, even a reordering, of representative roles within these regimes. Where information and consultation mechanisms have only been recently introduced, as in Ireland and the UK, they appear to have opened up space for management to exercise preference about the expression of so-called employee voice (Donaghey et al., 2012; Hall et al., 2011). Workplace representatives, both non-union and union, and their relative degree of cohesion, are at the heart of these experiences and, in interaction with management strategies, play an important role as to whether such forms of representation go beyond the artifice of management communications strategies (see, in particular, Hall et al., 2011).

2.4 Loss of and search for references

While they have to cope with the increased complexity of their roles on the ground, workplace representatives cannot rely on the same coherent reference systems that seemed to inform their predecessors. Union organisations have long been characterised by identity-based social choices, most often based on diverse but strongly marked policy orientations that flow from a reading of the nature of the employment relationship and of the role of workers in society. However, workplace representatives now seem to have to navigate their role with a more uncertain set of references. This is also the case for union leaders beyond the workplace as they try to establish policy on the basis of their operative reading of the daily practices of their workplace representatives who are confronted with these more complex sets of choices. This argument is encapsulated in the contribution by Christian Dufour and Adelheid Hege (2013, in this issue). In marked contrast to so many researchers who see legal and regulatory frameworks as a decisive influence, Dufour and Hege, drawing on their
research in different national systems of collective representation, argue that the major variation is the result of the ability to create a sense of collectivity in the daily act of representation. This entails a twofold task: maintaining close links with those they represent but also a critical distance through the mobilisation of external points of reference, which are so critical to dynamic workplace representation. In their view, the current period of strategic uncertainty for workplace representatives is characterised by a weakening of these references.

The diverse situations with which workplace representatives are confronted put their organisations in the position of having to invent and generalise new modes of support and renewed frameworks of reference (Heery and Conley, 2007). This disturbs the established organisational balance, and the criteria on which these choices are based are sometimes not responsive to new requests from workplace representatives or employees. The greater technical complexity of some roles may prompt workplace representatives as well as union leaders to favour a more technical path, so that both the services rendered by workplace representatives and those they receive from their union organisations are justified by their technical expertise. This option is likely to exclude workplace representatives who seek assistance with decisions regarding strategic choices and perspectives. The political function of the union does not disappear with the increase in the demand for expertise. The risks of hollowing out are also not excluded (Charlwood and Forth, 2009). This can be seen at various levels of union intervention, for example, when industry-wide negotiations produce few results other than the recognition of exhausted actors, or when local structures of representation are maintained but serve primarily as communication channels with the employer or are downgraded or even displaced in favour of non-union channels (Bryson et al., 2013). Some researchers favour a return to the former modes of commitment on the part of workplace representatives in order to preserve their resilience in the context of relative union decline (Darlington, 2010; McBride, 2004). Others see the fact of these same workplace representatives opening up to new relations as an opportunity for them to become part of a renewed mode of social movement embedded in the community (Tattersall, 2006; Williams et al., 2011; Wills, 2001). Yet others highlight how these strategies put new onus on workplace representatives to develop new narrative capabilities that enable them to locate the issues of their particular worksite in a larger set of references (Lévesque and Murray, 2013).

2.5 Union renewal

These multiple challenges offer a telling opportunity for studying some of the potential paths for union renewal. These paths may be in line with monistic systems wherein unions make decisions or with dualistic systems wherein rules first come from the outside union, with the workplace representatives acting as the key links. These challenges also prompt us to examine the multiplicity of conditions under which workplace representatives carry out their mandates. Some representatives appear to be completely constrained while others manage to provide themselves with a degree of freedom to act; some are restricted to their workplaces, while others go beyond them, and so on. Under what conditions can some workplace representatives have sufficient autonomy to act strategically while in other situations they do not? This variety of outcomes highlights the importance of an understanding of workplace representation for union renewal.
The importance of organising (recruitment of new members) and the potential mobilisation of activists has been a key theme in the union renewal literature, originating in the liberal market economies such as the United States and the UK but extending to more coordinated economies where the need to reconnect with members and potential members has become a major issue. For this first scenario, the article by Melanie Simms (2013, in this issue) draws on her longitudinal study of the involvement of workplace activists in union organising campaigns in the UK. She points to the importance of the quality of the multiple interactions between variably committed union activists, sometimes hostile employers, often directive union officials and ever watchful employees. Simms cautions against facile top-down versus bottom-up dichotomies because significant workplace activism is also dependent on considerable bargaining and service support from full-time union officials.

Germany provides an apt illustration of the second scenario, as illustrated by the article of Ingrid Artus (2013). In this apparently stable and extensive system of workplace representation, the re-articulation of levels of bargaining and the changing landscape of union representation, especially in terms of the growth of mini or midi jobs has challenge trade union involvement at the workplace level.

A key question concerns the role of the external union in strengthening workplace representation. Drawing on their multiple studies of the Australian experience of the training of workplace delegates, the article by David Peetz and Michael Alexander (2013, in this issue) identifies a virtuous circle. They find that training is essential for skills and confidence. In particular, it is more likely to achieve the core objectives of democratisation and renewal if it includes broader social issues (education rather than training on technical issues) and if it involves follow-up and mentoring to enhance workplace support.

The following five articles all explore the role of workplace representatives as strategic actors of union renewal in different national contexts and industries and from varied perspectives. These articles highlight in what ways the broadening and consolidation of the autonomy of workplace representatives depends on a re-articulation of their relations with their members, the renewal of the groups of workplace representatives, the strengthening of their strategic capabilities, the reconfiguration of external resources and references as linked to the unions to which they are affiliated, the strengthening of internal democracy, the adaptation of union education and training, and the redefinition of union projects and alliances. It is a daunting task but the articles that follow also point to many successes and further challenges in this quest.

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