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Paper 130: Dilemmas for contemporary trade unionism: lessons from the European steel industry



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ABSTRACT

Trade unions seek to tackle developments in the economic and social context of employment, as well as addressing changing membership priorities. Recent debate about union organisation and operation, particularly at a local level, has centred on an examination of the ways in which unions have been challenged by developments in the composition of managerial hierarchies and approaches, work and employment conditions, and legislative requirements; features and outcomes of the constant restructuring and transformation of capitalism. One somewhat understated dimension is the way unions in different national contexts may begin to address the implications of cross-border corporate restructuring. To focus such an enquiry, the paper examines dimensions of the European steel industry. The argument is that in the context of on-going sectoral restructuring, unions face the challenge of addressing the tension between nationally-focused policy and the forms of corporate development. The contention is that in this sector trade unions have maintained an approach to interest representation that centres on the state and/or supra state, rather than the emerging corporate form in the sector. I go on to suggest that one initial issue for these trade unions is the articulation of alternative perspectives. The paper employs data from a programme of research conducted across the European steel industry that started in 2000, and is on-going. Thus, the paper focuses on union responses to the challenges presented by the internationalisation of the European steel industry.

Key Words: Corporate Restructuring, Trade Union Form, Trade Union Strategy, Steel Sector

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Introduction

It is clear that within advanced industrial societies trade unions need to address a range of diverse challenges and concerns. This paper draws particular attention to the struggle trade unions face in keeping pace with changing corporate forms and processes of ‘modernisation’ and restructuring. Specifically, the paper focuses on trade unions as organisations largely operating within national contexts, but often dealing with global corporations making decisions international in scale. It is in this context that an argument is made for trade unions to articulate alternative perspectives to prevailing corporate practice, as part of union strategy development (see Hyman, 2007). The argument is made for trade unions to develop stronger cross-border collective capacities, which requires an assessment of union responses to processes of restructuring and involves a consideration of both strategy formulation and organisational capacity. More particularly, in addressing the emergent political economy, unions face challenges that are unlikely to be dealt with by nationally-specific and focused policies. The argument is made with reference to the European Union (EU) steel industry and the strategies pursued by trade unions in the context of the consolidation and restructuring of the industry. The key question is how and in what ways unions might better develop their collective capacities to deal with the array of challenges they face

To illustrate its arguments the paper employs evidence from primary research on the EU steel industry. Two examples of industry restructuring are drawn upon: i) plant closure and corporate retrenchment; ii) the broader implications for work and employment of restructuring processes, specifically focused on the increasing centrality of training and high skills to industry developments. The paper does not provide a definitive analysis of the current state of unions in this type of sector, but opens up themes for consideration and highlights lessons from a particular sector. It is a starting point for a more extensive enquiry into processes and contours of union renewal. In this respect, the analysis is aimed at identifying some of the more wide-ranging limitations and possibilities of contemporary trade unionism. The paper is presented in five steps. First, a discussion of the analytical context is provided. The research approach is then presented. Two sections follow that examine approaches by steel unions in relation to the restructuring processes outlined above. Discussion and concluding remarks complete the paper.

Analytical Context

Recent analyses of trade unionism have addressed a number of themes relevant to a consideration of trade union prospects, which apply to the emerging steel sector as much as any other part of the economy. One focus has been on union organising leading into associated discussions about union renewal and revitalisation (e.g. Frege and Kelly, 2003; Voss and Sherman, 2003). Accompanying these studies, and focusing principally on national trade union movements, there is also a growing literature about the ways sector/supranational and international union bodies address policy and practice. A particular context for this paper’s discussion is an assessment of the way national unions organise at a European level, particularly with regard to strategies employed by European industry federations (EIFs) (See Turnbull, 2009; Erne 2008; Traxler *et al.* 2008; Bieler 2005. See also Anner *et al.* 2006 and Tørres and Gunnes, 2003 on global organising and Gennard, 2009 on European Works Councils – EWCs).

Running parallel to such analyses is research concerned with trade union strategy, particularly in relation to corporate processes of workplace restructuring and occupational re-composition (e.g. Pernicka, 2006). These analyses raise questions about whether union initiatives in relation to organisation and strategy development are pro-active, albeit often in tentative and experimental ways or the degree to which these are instrumental and reactive responses (on some of these complexities, see Streek 1994; Voss and Sherman, 2003; Danford *et al.*, 2003). Elsewhere, are arguments concerned with the way trade unions might employ organising strategies that involve the global framing of interests and engage with processes of coalition forming and the pursuit of trans-national strategies (see Tarrow, 2005: 33; Anner *et al.* 2006; Turnbull 2009; Stroud and Fairbrother, 2009). The analysis in this respect focuses on the conditions and circumstances for co-operation and co-ordination of union response (in the European steel sector) to management decisions and the development of cross-border capacities and strategies as a way of influencing processes of restructuring.

To explore the process of change it is also necessary to consider analyses concerned with the continued saliency of trade unionism in advanced capitalist societies. One aspect of this analysis has centred on the possibilities of union renewal, moving beyond the routinised and increasingly limited form of organisation and operation of the past to consider debates concerned with ‘new bargaining agendas’ and ‘new unionism’ (see, *inter alia*, Rainbird and Vincent, 1996; Heery and Kelly, 1994). Another, suggested by Hyman (2001), is to explore the ways in which unions, locked into past forms of unionism, ‘business’ unionism, class unionism and social partner forms of unionism, attempt to meet the challenges of the present. This focus, as Hyman notes (pp. 38-9), draws attention to two features of contemporary European unionism, the first focused on the aspects and forms of social partnership and the second drawing attention to the salience of ‘national systems of political authority’ (p. 39)¹. The implication is that if unions do not shift their focus as sectors restructure then a tension between nationally-focused policy, elaborated via sectors, and corporate developments is likely to emerge (see also Hyman, 2007, for a different type of analysis, see Visser, 2007).

The debate about trade union prospects is clearly extensive, but the purpose here is particular. The paper examines how (steel) trade unions operating largely within national contexts might begin to shape change. In particular, the focus is on the potential for formulating and building cross-border collective capacity as a strategy for addressing new and emergent (sector) challenges. Focusing on the conditions for union capacity (Lévesque and Murray, 2006), the paper identifies two dimensions for initial study: i) the exercise of collective capacity, and ii) the process of formulating and building collective capacity (for a related discussion see Stephenson and Stewart, 2001: 8-9). The exercising or building of collective capacity might take a number forms, (including strikes, demonstrations, political lobbying, strategy building and so on) and it might be directed against a range of different actors (e.g. different layers of management, companies, governments). More particularly, notwithstanding the questions of ‘solidarity as a mobilising myth’ rehearsed by Hyman (1999), collective capacity might be engaged at different levels (locally, regionally, nationally and internationally) or across occupational boundaries/communities. Important here, and more generally in understandings of the way collective capacity is built and exercised, is an understanding of the leverage collective capacity might create (for example, whether a short demonstrative strike has an economic [versus the company] and/or political [versus the government] impact). Thus, what this paper explores, is the way collective capacity is exercised and/or built in the broader

¹ That is, social partnership as elaborated via social-democratic unionism or ‘political economism’ – defined as ‘a synthesis between pragmatic collective bargaining and a politics of state directed social reform and economic management’ (Hyman, 2001: 55).

context of the range of opportunities to act that exist – in particular, with regard to options for the prosecution of collective capacities on a cross-border basis – and critical to this are understandings of how and when and to whom pressure is applied, or what leverage might be exerted and on what basis (see, for example, Kelly, 1998).

To develop its thesis, the paper focuses on the EU steel sector – a sector that has experienced significant turmoil over recent decades. The fall-out from processes of restructuring and rationalisation, which have resulted in a much reduced European steel workforce, and the wider implications for steel communities are well documented (e.g. Beynon, 1987; Fevre 1989; MacKenzie *et al.*, 2006). The industry continues moreover to ‘modernise’ – technologically and otherwise – often with important implications, if not stark consequences, for workers and their representatives; particularly over changes in work organisation and, with this, parallel demands for more highly qualified and multi-skilled workers and increasingly sophisticated training and learning strategies (see *inter alia* Bacon *et al.*, 1996; Bacon and Blyton, 2000, 2004; Trappman and Stuart, 2004; Stroud and Fairbrother 2006; Stuart and Wallis, 2007; Greenwood and Randle, 2007; Leisink and Greenwood 2007). Further, the increasing consolidation of the industry and the transfer of ownership into fewer hands, as evidenced by the mergers of Arcelor and Mittal [in 2006] and the acquisition of Corus by the India based conglomerate Tata [in 2007], suggests increasingly treacherous waters that trade unions must now navigate.

During the post-war period steel industry trade unions enjoyed a significant degree of influence within the sector and the EU. From the initial founding of the EU steel unions have played a part in the way the industry has been shaped at a policy level (e.g. European Coal and Steel Community – ECSC). However, unions increasingly face two contradictory developments, one concerned with the internationalisation of steel corporations and the other located in the ever greater political and economic integration of the EU. Indeed, within processes of Europeanization, EU policy-makers present unions with a further parallel set of contradictory developments: neo-liberal competitiveness and common terms and conditions of employment (Room, 2005). Part of the latter rests on an increased emphasis on ‘Social Dialogue’, which has often taken the form of EWCs, but national unions have been unevenly involved in these processes – highlighting a national embeddedness with regard to union efforts to deal with European integration (Anner *et al.* 2006: 10). Specific to steel, the end of the ECSC in 2002 resulted in a steel sector social dialogue committee (SSSDC) being established in 2006. The committee provides a platform for dialogue at the European level, and involves the major European-based steel companies (through Eurofer, the employers’ organisation) and the trade unions (through the European Metalworkers’ Federation (EMF), the industry’s union confederation). The SSSDC provides European steel unions with the opportunity to address the implications and outcomes of the changes that have taken place in the EU steel industry over recent years.

In order to illustrate its arguments and carry out its analysis the paper employs evidence from case-study research on the EU steel industry, focusing on the two dimensions for initial study mentioned previously: the exercising and building of collective capacity. The former is discussed in relation to examples of corporate retrenchment and the latter in relation to the increasing centrality of training and learning agendas to industrial relations.

The Research

The paper employs elements of data from a programme of on-going research conducted across the EU steel industry that started in 2000 and which is on-going. The focus is on a number of different but interrelated sector issues: processes of restructuring and redundancy; workforce reconfiguration and equal opportunities; and, skills and training needs. The principal research methodology was case study research of selected companies, plants and communities.

To illustrate its arguments with regard to the exercising of collective capacity the paper draws on research on steel plants in Italy and the UK. The studies were conducted between 2002 and 2007 and involved major European multinational steel corporations: ThyssenKrupp (TKS) in Italy and Corus in the UK. In the UK, 40 redundant workers (twenty each from two sites in Ebbw Vale and Llanwern) and 8 trade union officials (from Amicus, now Unite, and Iron and Steel Trades Confederation (ISTC), now Community) were interviewed. Management and support agency staff were interviewed, too. The Italian case focused on one steel plant in Terni. Eleven interviews were conducted with city and regional state officials, trade union leaders (plant, municipality and region and the EMF), and a further two with experts. This research was supplemented by data from two Italian case-studies conducted as part of Europe-wide research, detailed below.

The arguments concerned with the formulating and building collective capacity focus on training and learning strategies across two international steel corporations: TKS plants in Germany (Duisburg) and Italy (Terni) and Corus plants in the UK (Port Talbot, Trostre and Shotton) and Netherlands (IJmuiden). The case studies involved twenty-four individual and thirty-two panel interviews to a standard (and semi-structured) format addressing skills and learning in the first round [2001-04] and equality and diversity in the second round [2004-07]. The panel interviews involved production workers and operators, team leaders, apprentices and section/production managers and the individual interviews involved training staff, trade union officials or officers, Human Resources Managers and Company Directors or Senior Managers. Observations from my involvement in the SSSDC between 2006 and 2009 are also included.

The aim of the methods employed was to elicit different perspectives from workers on the same issues, and allow workers to consider themes in general terms. At the same time, these workers had space to compare and evaluate their experiences within a group setting (see, for example, Smithson (2000) for a discussion of such methods). This methodology permits an examination of the social relationships that define union organisation and activity (in a particular sector). One aim was to explore the often opaque arrangements, that may be revealed through a succession of engagements between the researchers and the populations of the steel plants (see Burawoy 1998: 5-6). The outcome was a messy and complex set of data from which I attempt to identify a number of issues for discussion. Generally, I regard the data as highly suggestive of the way in which union approaches are shaped and fashioned in these steel plants. Indeed, whilst the conclusions drawn within this paper should be viewed tentatively, the approach followed provides a firm foundation for debate and further investigation.

Responding to Restructuring: Union Strategies and Initiatives

The context for trade union activity within the European steel sector has both worldwide and European dimensions. The industry is becoming increasingly global and consolidated into fewer hands. These multi-national corporations are shaping the sector, as well as acquiring and securing relationships with suppliers of raw materials (e.g. iron ore, coke) and transportation (i.e. shipping). At the same time, the modern EU steel industry constitutes a regional block for production, and for key aspects of trade. As outlined in previous sections, the paper focuses on two particular aspects of ‘change’ that the sector is experiencing to illustrate its arguments. First, the paper looks at the ways in which collective capacity is exercised, focusing particularly on two separate events in the UK and Italy, and trade union responses to the prospect of plant closure. The purpose is to present the way unions have addressed the dramatic aspects of restructuring: closure and the reduction of staff levels. Second, the paper details the increasing importance of training and learning (and related recruitment and retention) strategies within the wider context of industry developments, with the purpose of considering union strategies in relation to such aspects of ‘change’.

Dimensions to the Exercising of Collective Capacity

The exercise of collective capacity is illustrated in the way that unions seek to mobilise members in the context of major restructuring proposals. This theme is developed with reference to the closure and partial closure of Corus owned plants in south Wales, UK and the partial closure of a TKS owned plant in Italy. The results of mergers in the 1990s, both Corus and TKS have been involved in on-going and extensive programmes of restructuring and rationalisation, reflecting the more general picture of restructuring across the EU steel industry. Responses to the closure announcements were distinct at each site. The union response at Corus was limited and narrowly focused, whereas the TKS announcement was questioned in more solidaristic and collective ways. The aim is not to compare the cases as matched pairs and provide an analysis of like for like factors; rather the aim is simply to draw attention to the way collective capacity has been exercised in the context of corporate retrenchment (within union and national traditions). The section explores the limitations of the different responses. In what follows, each case is briefly outlined before a short discussion is undertaken.

Corus, United Kingdom

The Corus closures have their roots in the merger in 1999 between British Steel and Koninklijke Hoogovens, a Dutch steel producer, to create Corus plc. Following a corporate review, Corus announced a wide range of closures and staff reductions in February 2001 across the UK and Netherlands, including the complete closure of the Ebbw Vale plant (900 jobs) and the cessation of steel-making at Llanwern (1300 jobs), both located in south Wales. The closure of the Ebbw Vale plant was in two stages, with half the workforce leaving in July 2001 and the remainder by July 2002. Steelmaking at Llanwern ended June 2001, with the majority of jobs going in July 2001 and others following as the close-down proceeded.

The scale and size of the restructuring and redundancies made by Corus went far beyond what was expected by the union leaders and the membership. Certainly, closure was not expected. The response to the announcement was immediate and the unions became involved in three main levels of activity: i) plant level; ii) national level, via the National Steel Coordinating Committee (NSCC), and iii) more discursively with national and regional officer engagement in an All-Wales Task Force. The response was for each level of union representation to deal with one aspect of the redundancy proposal and programme, and not

with the event as a whole. Indeed, with other redundancies announced across the UK, each plant 'union' operated independently of each other and, significantly, maintained a site-wide coherence of response (see Danford *et al.*, 2003: 49–54). Local representatives sought agreements on the orderly departure of redundant workers and met local concerns. Meanwhile the regional representatives tried to coordinate the responses of the different plants, playing their part in the All Wales Task Force and petitioning the Wales Assembly Government. Meanwhile, the national leadership dealt with the corporate management and the Wales and UK governments.

This was a form of representation that 'proved highly amenable to the pursuit of a managerially-defined agenda for change' (Blyton and Turnbull, 2004: 223), and arguably facilitated the redundancy process:

There was no demonstration. There was no objection... Although we put alternative plans together we knew ...[that] you cannot consult after the event. They [the company] told us we were closed. They [the union] told us to go away and fight it. Well you can't. We knew that was the case. So whereas if you had a strike or where you had a Longbridge situation where the whole community is out in one... (*Ex-Senior Union Representative, Ebbw Vale, ISTC, September, 2007*)

This was the result of unions dealing with the decision in a fractured ways, with site unions developing site-specific proposals, as the national leaders sought a different outcome from the company:

So we met up there [London], expecting to see this lovely impressive booklet for presentation. But all we found is that they [the NSCC] just stapled everybody's side of the plan together, they hadn't even changed the pages! (*Senior Union Representative, ISTC, Ebbw Vale, February 2003*)

Thus, while the NSCC secured a moratorium to draw up alternative plans, nationally and plant by plant, closure was confirmed in May 2001. Critical in this respect is that there was limited contact with union counterparts in the Netherlands (subject to different formal requirements with such announcements) – beyond declarations by Federatie Nederlandse Vakbeweging (FNV) not to touch production transferred from the UK – and thus little attempts to challenge the redundancy programme at a company level, although detailed but ultimately fruitless consultations within the EMF and with the European Commission (EC) were conducted.

ThyssenKrupp Stahl, Italy

A similar pattern of relations to those outlined above is evident in the response by three Italian plant based unions to a proposed closure of part of a steel plant by the German-based steel company. While a more 'militant' response than in the UK, it also illustrated the complex set of relations now involved in union responses to multinational corporate decisions and initiatives. TKS was formed following a merger of the German companies Krupp-Hoesch AG and Thyssen Stahl AG in 1997. In 2000 the new company embarked on a Europe-wide reorganisation, establishing a divisional structure, and promoting production according to an assessment of each plant within each business unit. As part of the divisional review, in 2003 TKS proposed transferring the production of 150,000 tons per year of low-grade electrical steel from Terni – an industrial town of 109,000 and capital of Terni province in southern Umbria – to other steelworks, as well as ending the production of specified high-grade steels.

The plant employed over 4000 employees in 2002, with an average age of 48 years. However, many older workers left following the implementation of legislation relating to exposure to asbestos. By 2004, 650 young replacement workers were employed on fixed term contracts, with the workforce comprising just fewer than 3000 employees by 2005. Most of the workers belonged to one of the local branches of the three main union confederations in the steel industry: Federazione Impiegati Operai Metallurgici (FIOM), Federazione Italiana Metalmeccanici (FIM) and Unione Italiana Lavaratori Metalmeccanici (UILM). At the plant level, a joint union committee dealt with management. This body had close and long-standing relations with the city and regional levels of the union organisation as well as the relevant political administrations. With the announcement of the decision to close part of the plant on 24 January 2004, the plant union leaders initiated a strike, accompanied by road blockades, demonstrations and rallies. On 18 February, a temporary settlement was achieved, with an agreement to retain the production of electrical steels and promote investment within the plant and by public authorities. However, in early November the company withdrew from further negotiations. The Joint Union Works Committee recommenced its campaign against closure, with limited success. On the 28 January 2005, timed to coincide with a meeting of the Supervisory Board of the company in Duisburg, Germany, the unions organized a four-hour strike, including a blockade of the motorway and the central railway station.

Of equal note, attempts to broaden the dispute, beyond national boundaries, and address the problems at the European level, via the EMF, and the company Councils, foundered on national divisions. First, the plant had one workers' representative from Italy on the Supervisory Board, drawn from the local union leadership, although he had limited effectiveness in advancing the case for reversing the corporate decision. Second, a key union member and leading expert on the steel industry played a central part in securing links with the EMF in relation to the strike, as well as promoting links with the German steel union IG Metal. However, the EMF and IG Metal initially did not take a firm stance against the company decision. As it was, the Supervisory Board confirmed the end of electrical steel production at the Terni plant (with workers' representatives voting against). On 31 January 2005, the unions organised strikes covering each shift, with continued blockade of the railway station. With the failure of national negotiations, the plant unions escalated their campaign and after another extended period of blockades, strikes, and rallies, a settlement was eventually reached on the 22 February 2005. The settlement included cessation of electrical steel production and in this respect the union was defeated on the central issue. However, some success was evident in the relocation of the threatened 350 workers, unless they wanted to take voluntary redundancy, and the conversion of 650 temporary contracts to permanent ones.

Discussion

The events outlined above highlight some of the limitations to the union exercise of collective capacity. Closure and redundancy situations are very specific events and tend to place organised labour in a particularly weak position as employment is not maintained thereafter. This paper cannot know what the outcome might have been if the unions had pursued different courses of action (perhaps leading to reversal of company decisions). However, these events do tell us something about the way collective capacities have been exercised by steel unions (and federations) and also tell us something about trade unions prospects. What is illustrated above is that much of the focus of the activity was at the locality level; for example, in relation to the young leaders in Terni mobilising their members to make clear their concern about the proposed closure, while at the same time giving voice to their worries about their terms of employment. In the process, they revealed a capacity to organise and

operate as a ‘militant’ collectivity, but one that was more or less confined to the locality. These local leaders did not play an active part in union politics outside the plant; nor did they represent the membership at the corporate, government or European Union level. Off-site representation was undertaken by provincial union leaders (who did not work in the steel plant), and individual members (although not formal union leaders) were active within the EMF. The result was a fractured set of relations, particularly in relation to the cross-border corporate level.

More generally, both cases reflect perhaps the limitations of working within union and national traditions, and one question is whether these can easily be escaped from. In each case, despite the starkly different responses and levels of mobilisation, the approach to the prospect of closure was rooted in a past set of relations that were increasingly limited in impact. More particularly, despite the different approaches to the announcements it was that the more robust approach in Italy was hardly more efficacious. More generally, the unions in both cases engaged with policy makers at each level (local, national and occasionally internationally), but they did this in a disaggregated way. The problem is that the layered sets of relations, hierarchically structured, from the plant, to the region, to the national and the cross-border did not address the immediacy of the current political economy; locality-based activism often has little leverage on decisions that are made by multi-nationals on a cross-border basis. Of course, this is not to say that something new about the behaviour of multinationals is indicated and nor is it to say that unions cannot (successfully) challenge multinational corporations, clearly they can (see Bronfenbrenner, 2007). Rather, it is to assert that there is an imperative on unions to formulate more wide-ranging or different and ‘strategic’ approaches, and engage multinationals on a more equal footing.

These unions are operating in a changed political economy, characterised by a move from social democracy/social markets to social liberalism/neo-liberalism. National trade unions are moreover, challenged by the new geographic scale of capitalism in a globalised context (Anner *et al.* 2006: 9). Thus, in the case of the steel industry, as the industry consolidates and the relative influence of multinationals grows, union leverage becomes increasingly compromised. At the same time, political leverage is seemingly diminished by the sector’s currently low level of strategic importance to the state and supra-state. The increasing levels of merger and acquisition activity and multinationals’ implementation of a range of strategies to intensify and increase productivity across the steel sector exposes unions to a continually changing terrain of struggle, which questions current union strategies and capacities (See Tarrow (1994) on ‘political opportunity structures’. See Stroud and Fairbrother (2009) for arguments specific to steel). The commonsensical argument is that in the face of such (global) pressures unions need to develop trans-national/cross-border strategies that put into place capacities that anticipate the direction and specificity of the capital structure and the capital intensity of the sector/companies they are dealing with (Kelly, 1998).

However, the globalisation of capital has implications for cross-national cooperation (or labour trans-nationalism), with the possibility of growth in inter- and intra-sectoral differentiation potentially compromising such strategies (Anner *et al.* 2006). At the same time, the spaces opened up within and around firms by contests over the forms and structures of globalisation (and Europeanization) not only create new terrains of struggle, but spaces for building collective capacities – within and across borders (see Anner *et al.* 2006: 10). The argument here is that, as secondary organisations to the employer, unions need to exploit these spaces by anticipating the shape, direction and form of change, and engage directly with the more widely constituted and integral elements of industry restructuring. To illustrate, the

paper examines union engagement on training and learning within the context of a changed steel industry, and the capacity of unions to prepare for and deal with the processes of restructuring that are underway.

The Potential for Building Collective Capacity

It is clear from previous sections that the steel industry has undergone a dramatic period of rationalisation and restructuring. These processes continue and the recent economic downturn has intensified such pressures, with subsequent implications for the profile of the industry's workforce and for the shape of work and employment more generally. These developments are acknowledged by unions (*Observation of SSSDC, 2007*), but less consideration is given to how unions address them, particularly with regard to important questions related to training and skill formation. The question arises of why it is difficult to mobilise and develop collective capacity around issues like training, when for the industry the times are essentially about restructuring and placing workers in such a position as to better resist and recover from processes discussed in the previous section. In what follows, the paper describes the current shape of (union engagement with) training in the EU steel sector, before discussing why training is an important agenda for steel trade unions and how, in relation to the training agenda, unions might best develop the (collective) capacity to prepare for change.

Training and Unions in the EU steel industry

As the industry's restructuring processes have unfolded, it has been concerned to develop the appropriate capacities to facilitate change. Part of this has involved a consideration of new and emerging training needs; precipitated by developments in the workforce profile, technological developments and the broader processes of restructuring. Of note, increasing consolidation within the sector and the emergence of multinational corporate entities, international or global in scale and scope, means that management is dealing with differently educated and qualified workforces from place to place. The qualification profile of a workforce and the training provision within a company – steel or otherwise – is very much a reflection of nationally defined (education and) vocational education training (VET) arrangements. Within the EU the form of VET in each member state is distinct, often sector specific, shaped by specific histories that reflect both established social partner co-operation and diverse forms of work organisation (Bosch and Charest, 2008; see also Ashton, 2004). Thus, the basis of company training strategy – particularly with regard to formal programmes and initial training (e.g. apprenticeships) – will be different from country to country, and the scope for trade union involvement on training will differ by country, too.

In the Netherlands, for example, where the Works Council and the FNV union federation (and affiliate trade unions) adopt pro-active and co-determined strategies with regard to workforce development, Corus has developed a fairly comprehensive set of training arrangements and, of particular note, a Practical Craftsmanship Programme (PCP) for low-skilled workers (*Interview Notes, 2002*. See also Leisink and Greenwood, 2007; Trappmann and Stuart, 2004). For Corus UK however, the approach was very much management directed, with limited involvement from the unions, involving no structured discussion and no right to bargain about training (see Leisink and Greenwood, 2007: 350-355). Indeed, the major UK operators' union, Community, follows traditional methods and lines of representation, which largely ignores the training and learning agenda (see Bacon *et al.* 1996: 25; Leisink and Greenwood, 2007; Stroud and Fairbrother, 2008a).

Similarly, the high levels of co-determination evident in Germany allow the trade unions to generate greater influence over training – principally through the *Bundesinstitut für Berufsbildung* (Federal Institute for Vocational Training) and the mechanism of works councils (see Bacon *et al.*, 1996; Ashton 2004). The social partnership approach and involvement of IG Metall in both corporate and plant management policy-making is more likely to create favourable contexts for the pursuit of skills-orientated strategies, as a union official observed:

‘the future occupational profiles for the steel industry are developed in an institute for vocational training in Berlin... and they have representatives there from trade unions and employers.... The trade unions make sure these professions are multi-functional... trade unions are also putting in effort (to) get a much stronger relationship to their company during training’ (*IG Metall Official, 2002*).

The outcome is that there are significant differences in the organisation and structure of training in the TKS plant visited in Germany compared to the TKS case study plant in Italy. Indeed, whilst acknowledging the complexity of Italian industrial relations and in this respect the scope for ‘differences’ between unions, the Italian metalworkers’ trade union section of the Confederazione Generale Italiana del Lavoro (FIOM-CGIL) suggests an adversarial relationship concentrated less on the development of training than on the negotiation of pay, safety and work organisation: ‘No we are not participating (in training). It is entirely a matter for the company.’ (*FIOM-CGIL Official, 2002*).

It is evident that on a more general level the way training is organised across a company will differ from place to place, and that union involvement in training will reflect more broadly the degrees of social partnership that operate nationally. However, where higher levels of formal union engagement on training through partnership approaches exist, they do not necessarily guarantee improved outcomes for workers (e.g. better access to training and qualifications), nor do they meet demands for continuous lifelong learning and create (equal) opportunities to upgrade skills in parallel with industry developments (Ashton, 2004). Indeed, where such partnership arrangements exist accommodating the demands for continuous, lifelong learning remains problematic and, in Germany particularly, ‘attempts by trade unions to encourage joint regulation of all worker training have, in the main, been unsuccessful’ (Ashton 2004: 31). For the most part social partnership on training mostly concerns initial training and less so further workplace-based training (Crouch *et al.*, 1999). As Leisink and Greenwood (2007) argue, such institutional frameworks are actually less effective in determining the implementation of training and actual participation, than management attitudes, worker characteristics and union activities. Thus, despite different regulatory conditions from country to country, there is often little overall difference between plants of the same company when it comes to influencing (worker) participation in company training programmes (*ibid*: 356-359).

Indeed, across the case-study plants the problem for trade unions and their memberships was that uneven access to training occurred more generally by occupation and qualification profile, with patterns of engagement largely determined by management and trade union involvement limited (see Stroud and Fairbrother, 2006; Leisink and Greenwood, 2007):

‘Computer courses, the English language course. The English course had already been set up, but was only available to technicians and higher positions. The worker had to

remain an ignoramus unless he could get a recommendation [from management].’
(TKS Italy, *Production Manager*, 2001)

Unfortunately we don't have equal opportunities (to training courses), office workers can have them, the others can't. This is still a problem in Italy. (TKS Italy, *Production Worker*, 2005)

In part, this situation seemingly derives from the cultures, history and work organisation of the industry, which have combined to create a particular type of learning environment based on informal practices, which is structured more generally by management and union responsibilities towards training (see Fuller and Unwin, 2004: 34; Stroud and Fairbrother, 2006). Thus, whilst a significant number of workers across the industry will have undertaken an apprenticeship, they are predominantly skilled by experience and reliance by management on informal practices, such as learning-by-doing: ‘Learning-by-doing. Yes. That is the lowest level and they [management] promote it..... ...Low based education.’ (*Corus Netherlands, Work Council Rep.*, 2002). Such approaches to skill formation are a common feature of internal training across the industry and largely exclude unions; with management acting as a gatekeeper to training opportunities and filtering (and often restricting) access to what formal (and value-added) learning opportunities they do provide (Stroud and Fairbrother, 2006). The claim is that unions are complicit with this strategy and ‘locked’ (by the past) into viewing and treating workplace learning as an additional and narrowly defined objective, rather than as core to members’ interests and concerns (Stroud and Fairbrother, 2008. See also Bieler, 2005: 471).

In relation to the above, the question for trade unions is two fold: i) Why is it important for steel trade unions to engage more positively with training and learning agendas and, moreover, why might it lead to unions being collectively stronger? ii) How might unions best develop the (collective) capacity to prepare for change – in this case engage with the training and learning agenda as a product of wider restructuring processes – and defend the interests of workers *qua* workers?

First, let us deal with the questions of *why*. At the most basic level, access to training and qualifications is important for the development of worker employability profiles. This is an industry vulnerable to restructuring and large-scale programmes of redundancy, but the accreditation of skills has not always been a concern for companies: ‘...it is important qualifications are not pursued as an end in themselves, even if the Further Education College points out the funding available if they are awarded...’ (*Corus UK Training Strategy*, 2000 p. 2). Further, as the sector restructures the emphasis is on recruitment strategy and the recruitment of skills, rather than addressing skills deficits by offering remedial training to less skilled or qualified members of the current workforce (*Observation of SSSDC*, 2009). For workers, learning in the workplace (and, in particular, acquiring qualifications) is an important protection against employment instability, but at the same time might not be viewed as a priority for employers and may also be viewed as a threat to managerial control (Heyes, 2000). The argument is that the adoption of progressive skill-orientated strategies by trade unions becomes important because such strategies challenge the employers’ prerogative with regard to training and combats deskilling (Mahnkopf, 1991). More importantly, developing this agenda places workers in a better position to adapt readily to changing circumstances in the restructuring process and enhance bargaining positions (Streeck, 1992).

The training and learning agenda is becoming increasingly central to industrial relations – particularly within the context of the determinants of the European social model (see Stuart, 2007) – and the need for a more coherent union skills strategy (by sector) is becoming increasingly important, too (see Stroud and Fairbrother, 2008). At present, whilst pockets of union success on training might exist (see Wallis *et al.*, 2005; Heyes, 2009), the outcome is that steel industry management has significant influence not only on the shape and form of training, but also on the participation of workers (see Stroud and Fairbrother, 2006; Leisink and Greenwood 2007). Indeed, even where institutional and regulatory arrangements have proved important for agreements on learning and setting the conditions of training participation, adherence to such agreements is partial and uneven (Leisink and Greenwood 2007). It is management that continues to take the lead on what training and skill needs will be met, and in what ways – particularly forms of workplace learning beyond initial training (Crouch *et al.* 1999). As things stand, multinational steel companies have scope to restructure operations and develop the adaptability and flexibility of their labour as they see fit, dealing with unions within their national contexts and treating workers differently within and across the same company. It might be that in more general terms, aspects of this are picked up by EWCs (Gennard, 2009), but the argument is that there is clear scope (need) for greater cross-border union engagement on minimum levels of provision within and across a company (if not the sector)². Such arguments bring us to the second question of *how* unions best develop the capacity to prepare for change. In what follows, the paper briefly examines ‘how’ this strategy is currently being pursued.

The argument is that the current lack of union coherence on training necessitates a response, which includes potential for the building of collective capacity to address particular aspects of restructuring, and provides an opportunity for unions to gain leverage on the wider implications for workers of ‘modernisation’ processes. Whilst steel unions appear unevenly engaged in training, there is a general recognition of the importance of training at a plant and national union level (*Interviews 2001-2007*), and at the European level the steel training agenda has been picked up more recently by the EMF and pursued through the SSSDC (*Observation of SSSDC 2009*). Indeed, on January 28th 2009 the SSSDC agreed to set-up a steering group to develop a common position on ‘workforce development, recruitment and retention’ (*Observation of SSSDC, 2009*)³. In some senses, this is a case of better late than never, as ‘most (other) European social dialogue sector committees have (already) discussed lifelong learning and have developed concrete actions’ (Winterton, 2007). With particular regard to the steel industry, the apparent delay in developing this agenda derives, in part, from the particularities of sector specific cultures, where – with regard to training and learning – informal practices have traditionally taken precedence and union engagement has tended to be limited and nationally bound. Indeed, there is a history of uneven engagement by national unions with the EMF training agenda (Erne 2009), which reflects i) the traditions of union engagement across the sector more generally, and ii) the different levels of national union engagement with the institutional and regulatory contexts that govern national VET arrangements.

Observations conducted at three SSSDC meetings on training during 2009 highlight a consensus between unions and employers on the importance of the training agenda. It would

² See Stuart (2007: 278) on the need to engage employers in new ways, whatever the national context with regard to training and industrial relations regimes.

³ This is paralleled by similar efforts within the European Steel Technology Platform (ESTEP) to develop a training agenda. ESTEP brings together a range of industry ‘stakeholders’, including unions, to tackle a range of industry issues.

however, be simplistic to suggest that this constitutes a ‘new industrial relations’, which is based on common interests in high skills (Streek, 1994: 251). As Sutherland and Rainbird (2000: 190) suggest, what is being warned against is ‘misunderstanding the relationship between productive cooperation and distributive conflict on the one hand, and between cooperative policy and adversarial politics on the other’. Indeed, Streek (1994) is clear that this does not signal an end to the adversarial relationship, and observations from the SSSDC confirm Eurofer’s occasional reluctance (at the employers’ behest) to fully engage on this topic, seemingly, in part, for the reasons alluded to earlier by Heyes (2000), but also for apparent reasons of corporate confidentiality (*Observation of SSSDC, 2009*). Nonetheless, as Sutherland and Rainbird (2000: 190) suggest, union engagement with such agendas does provide them with opportunities ‘for the constructive and creative re-thinking of policies’. It might be that the EMF’s tendency towards a strategy of benchmarking standards, the success of which is contested (see Erne, 2008; Bieler 2005), casts some doubt over whether the SSSDC is the appropriate means to build cross-border collective capacity and defend member interests – the question of a separate and independent agenda should be considered (see Sutherland and Rainbird, 2000). But, such engagement in cross-border initiatives signals perhaps an aim to reassert control over the broader processes of restructuring currently being led by steel multi-nationals.

Discussion

The purpose of the following discussion is to draw together the threads of argument that have been made above, and highlight the lessons that might be learnt from the EU steel industry on the potentialities of/for cross-border collective capacity. Generally, what is being argued above is that an increasingly consolidated and ‘internationalised’ or ‘global’ (steel) sector presents nationally embedded unions with problems of a particular character, presenting them with the need to reflect on organisational capacity and formulate strategies that engage multinational companies beyond national (or domestic) contexts. More particularly, what is addressed is i) the need for unions to consider *how* they might organise to best challenge threats to their own power (e.g. company retrenchment and redundancy), and ii) *how* unions can develop the potential for building power in other areas (e.g. the training and learning agenda), and address in less direct ways the implications of the former.

As secondary organisations to the employer, unions attempt to mobilise and represent their membership to address the content and implications of management decisions and practices. More particularly, they tend to do so as organisations with historical links to the nation state. As Visser (1996) suggests, diverse national arrangements in the field of industrial relations have integrated the working classes into their nation states and provided them with important rights and benefits (Erne 2008: 3). However, market liberalisation and the interests of globalising capital bring into question the salience of these ‘national systems of political authority’ (Hyman, 2001: 39). As Hyman (2007) suggests, there is a danger that should unions not shift their focus beyond nationally-focused policy as sectors restructure, sectoral and corporate developments will overtake them. However, ‘it should not necessarily be assumed that while capital is capable of transcending space, labour is necessarily confined to place’ (Turnbull 2009: 7).

The conditions and circumstances under which trade unions might cooperate, coordinate and organise at a European (and global) level have been variously set out by a number of commentators (See *inter alia* Turnbull, 2009; Erne 2008; Anner *et al.* 2006; Tarrow, 2005;

Bieler 2005). Turnbull (2009), in particular, draws attention to union success in the ‘global framing’ of worker interests and specifically the concerted campaign of industrial and political action by European dockworkers in face of the European Commission’s strategy to ‘divide and conquer’ workers in the pursuit of market liberalisation. Critical to the success of this campaign was the European Transport Workers’ Federation (ETF), and its development as a supranational force, and an engagement by different unions in coordinated and contentious action – including a first ever pan-European dock strike (Turnbull, 2009).

What is drawn attention to here are two points: i) possibilities for the development of collective capacity to meet the changing circumstances of work and employment, particularly in transnational sectors (an obvious area here is the training and learning agenda); ii) the inadequacy of a non-collective capacity. In this regard, Turnbull (2009: 2) highlights the way collective capacity steps beyond the confines of domestic conflict to con-join ‘the force of argument (and) the argument of force’. The strategy of the dock workers’ national unions and the ETF thwarted EC strategy and diverted the course of Community action. Turnbull (2009) suggests that key to this success was ‘shifting scale’ (Tarrow and McAdam, 2005) from the national to the international arena, and, in particular, the role played in this by the ETF. The question is whether this strategy (and success) could be replicated in other sectors (e.g. steel)?

Hyman (1999: 111) suggests that generally European level organisations ‘possess extremely restricted capacity either to influence capital or the EU decision makers, or to communicate with the members whom they in theory represent’. EWCs are a case in point, but embody a tension between nationally-based unionism (dealing with worksites) and sponsored supra-national trade unionism. However, Turnbull (2009), as illustrated above, and Bieler (2005) – on the EMF – suggest European industry federations can have real influence. The EMF deals with one of the most trans-nationalised sectors in Europe, and steel forms part of the portfolio of industries. At present, as an overarching strategy, it has focused on common minimum standards and guidelines, or a benchmarking approach. For example, in response to sector restructuring and further EU integration, the EMF has instituted a policy to move beyond national wage bargaining negotiations and adopted European collective bargaining co-ordination; in effect benchmarking affiliates’ national wage bargaining. Similar approaches are also evident in other areas, with varying degrees of success (see Erne, 2008; Bieler 2005) – the success of the SSSDC steering group on training remains to be seen.

More generally, the success of coordinated European collective bargaining policy is contested (see Traxler *et al.* 2008; Erne 2008; Bieler 2005). It is moreover, difficult to see social dialogue or ‘benchmarking’ influencing in significant ways the more strategic and dramatic business decisions discussed in other parts of this paper. Indeed, on this, the question is *how* could labour have succeeded? The workers at Terni forced some concessions, but Turnbull (2009: 7), on dock workers, provides one example of ‘a course labour can navigate (through) the waves of globalization and liberalization’; and the ‘global framing’ of interests seems pertinent to steel in this respect (Tarrow, 2005). Certainly, trade unions might respond to problems by identifying synergies with foreign counterparts and forming cross-border links and relationships, with the aim of tackling the ‘international’ repositioning of the employers with which they must negotiate (Turnbull, 2009; Anner *et al.* 2006).

However, a reliance on cross-border confederations, such as the EMF, raises questions about capacity, which may lead to an overestimation of what is possible (Anner *et al.* 2006). This is particularly the case when attempting to engage ‘unions which enjoy considerable access to decision-making at the national level’ as they ‘are less likely to support the establishment of a

European industrial relations system, even if they represent trans-national sector workers, than those unions which have lost out at the national level' (Bieler, 2005: 479. See also Anner *et al.* 2006). This was dramatically illustrated by the different approaches from the Netherlands and the UK in relation to the announcements by Corus of redundancy programmes in February 2001. Each was bound by the particular legislation and practices that applied in both countries; the cross-border approach to 'rationalisation' by the corporation was not accompanied by a cross-border union response; there was little in the way of 'sharing the pain' or aiming for 'mutual gain' (see Greer and Hauptmeier, 2008 on autoworkers' unions).

In part, the focus here is on the (in)ability of (steel) trade unions to 'frame coherent policies' (Hyman, 2007: 198) in relation to the changes that are going on around them – not least with regard to competitive tensions between unions, which problematises cooperation across national boundaries (Anner *et al.* 2006). The argument in this paper is that unions need to develop cross-border collective capacity through proactive and preventative policies in relation to restructuring, adopting an anticipative and long-term perspective rather than incorporation into crisis management on the employers' terms (see Sutherland and Rainbird, 2000: 194). The case of training is relevant here, and arguments for the increasing centrality of training to industrial relations are made above and more extensively elsewhere (see, *inter alia*, Stuart, 2007; Sutherland and Rainbird, 2000). This paper's emphasis is on formulating and building collective capacities with regard to training agendas, particularly across multi-nationals, and thus building the capacity for more strategic forms of leverage, questioning management prerogatives on workforce development and planning. This requires unions moving beyond the nation state focus that tends to prevail, with 'a reorientation of union strategies and a need for new modes of engagement with employers, whatever the national context' (Stuart, 2007: 278).

Concluding Remarks

In the context of the European steel industry, against a background of EU policy largely framed by neo-liberal economic imperatives, unions struggle to meet the challenge of comprehensive and widespread restructuring and change – ranging from closure and redundancy to the new and broader implications for work and employment of restructuring processes. The principal focus here has been on the limitations of union policy development in the steel industry, which makes it necessary to consider how union capacity may be realised collectively in these changing circumstances. Indeed, the task facing unions in the circumstances of changed managerial hierarchies, shifting patterns of ownership and more assertive approaches is to assess and evaluate their capacities to operate on this changing terrain. This paper draws attention to the importance of continuing to re-examine the different dimensions involved in processes of union renewal. It is reasonable to infer that there is an increasing disjuncture between institutional arrangements and practices, indicated by the focus of multinational corporations in the case of steel, and the ways that unions organise and operate. It can be argued that the way forward for unions in these circumstances is to prioritise the organisational and strategy questions, and only then will unions be in a position to realise their capacities, in relation to internal solidarity, external solidarity and proactive initiatives (Lévesque and Murray, 2006).

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