How Do Workplace Unions Change?  
A comparative assessment of the role of reflexivity  
When Local Unions Change, Do They Stay Changed? Reflexivity vs Referential Unionism

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Referential Unionisms: Exogeneity or endogeneity?

- Choices of workplace union leaders reflect past practices and norms.
- Previously internalized choices constitute key reference points – referential unionisms – for evaluation and evolution of current and future practices.
- Highlight a) path dependency of union actors & b) complexity of processes of adjustment (not just problematizing impact of external stimuli but how this entails a continuous reconstruction of the internal dynamics of workplace unions).
Figure 1. Component dimensions of referential unionisms
Four questions:

• Q: Are referential unionisms being transformed in the context of globalization?
• Q: How do union actors act upon their referential unionisms in order to orient the trajectories of their own transformations?
• Q: Once workplace unions change, do they stay changed and, if so, why or why not?
• Q: What is the role of reflexivity in these processes?
Methodology

- **Cross-national workplace union comparisons** (n≈+/- 30): observation over time (2003-2015), diversity of actors, bi-national team present at all interviews, extensive face-to-face with multiple members of local union leadership teams

- **Purposive selection** (n=7): cases exhibiting a higher degree of self-transformation; minimum of two substantial field visits and a mean of three visits to validate state of self-transformation with lag of 3-5 years (T0-T1-T2-T2+)

- **Seven manufacturing sites**: four different MNCs (7 sites); 5 different institutional contexts (Canada, US, Belgium, France, Germany); 64 interviews for these seven cases
What we found: Referential Unionisms / Travail sur soi / Reflexivity

Referential unionism = a set of precepts about how a union behaves in any given set of circumstances = often unconscious, but referential unionism generally ensures its reproduction but this reproduction can be volatile, unstable, contested and therefore change in the process of its own reproduction.

A change in referential unionism suggests a conscious change in self definition and this has an impact on the different components of its referential unionism. Therefore, how local leaders seek to rethink the foundations or the boundaries of their referential unionism.

This entails a “travail sur soi” or a capacity for self-reflexion or reflexivity and the work on the different dimension of this referential unionism.

Invariably, such reflexivity is present in all of the cases where we observe such transformations in referential unionism but a continuum and shockingly volatile
Key Findings I: Work on Union Self or Self-Reflection

• Referential Unionisms and work on union self ("travail sur soi", "work on self", reflexivity)
  → each union lives in relation to referential unionism but volatile, contested & unstable reproduction – evident in T2 and T2+ observations
  → conscious work on self-definition or union self is at the heart of renewal processes = rethinking boundaries of referential unionisms and different dimensions of referential unionisms in all cases
Key Findings IIa: Common Traits in Seven Cases

- **Context**: each site on the edge, facing dangerous opportunities because facts no longer fit referential; but opportunities not a given, union plays key role in the creation of the opportunity that is then woven into the self-narrative (referential); [consequence of a weakening in framing...]

- **Institutions**: although there were obvious differences in the institutional arrangements, these differences made little apparent difference to the renewal process since these institutions were thoroughly internalized and local unions had to act upon them (for example, boundary-spanning and rule-making as opposed to rule-taking behaviours were more prevalent in the transformed unions)
Key Findings IIb: Common Traits in Seven Cases

• **Capacity**: importance of resources & capabilities (see Lévesque & Murray (2010) because each leadership has a capacity to act

• **Temporality**: the change in referential unionism takes time and change is constructed over time (leadership must be able to assume this temporality); often shocked by the volatility of the processes and the rapid reversals, notably around changes in leadership, demographic changes and changes in organizational context
Key Findings III: Varieties of Path Departure

• T2≥T1: Three cases of referential transformation gained
• T2≤T1: Two cases of referential transformation maintained
• T2<T1: Two cases of referential transformation lost
Change in Referential Unionisms Gained (T2≥T1): Three cases A

**Amermetal:** pragmatic experimentation with codification of new set of references, led by local leadership with strong external support, risks of mediating between external & possibly deviant allies and internal membership dissension; enlarged role because union becomes co-manager of jobs with enhanced external alliances. Reconstruction of union in relation to management (↑ proximity); entails changes in relationship to externals (↑ larger union, ↑ community) & to members; ability to make trade-offs around survival of plant, resisting concessions in pattern bargaining.

**Belgetrans:** similar pragmatic experimentation with new sets of references, led by local leadership with strong deliberative capacity and exceptional strategic capacity in the face of difficult market circumstances that could ultimately jeopardize this transformation; strategic capacity evident in transmission and organization of knowledge ex. Systematic site visits to other unions ex. Detailed knowledge of business and active role in saving plant.
Change in Referential Unionisms Gained (T2 ≥ T1): Three cases B

**Cantrans**: reconstruction of union with movement from job control to social movement (def. of interests) through effort to codify new set of references; dynamic internal tensions & risks from deliberative processes; enlarged definition of interests & means/repertory to achieve them, new alliances, new claims (without partnership); capacity to transform market circumstances and to engage in the identity work that this entails; continued capacity of the next generation of union leaders to pursue this transformation; $\Delta$ in leadership & $\Delta$ in membership demographic make the process more fragile and open to contestation.
Change in Referential Unionisms Maintained (T2≤T1): Two cases

**Gertire:** enlarged role because union becomes co-manager of jobs; process started through unionization of site, enhancing representative capacity & deliberative structures, modifying site identity; strong strategic capacity of leader to re-articulate the relationships within different levels of company; but (T2), changes in corporate structure and unions beyond the site raise issue of transformed referential unionism in the context of eventual leadership renewal.

**Cantire:** pragmatic experimentation with partnership, led by local leadership & risk of opposition from members; reconstruction of role from claimer to manager & partner in job protection (change in importance of contract admin), enlarged def. of interests, but weakened alliances. Therefore, reconstruction of union in relation to management through partnership (↑ proximity); Δ relationship to externals (↓ larger union, ↑ community, ↑ public authorities) & to members; but fragility of leadership because of ↑ isolation (T2)
Change in Referential Unionisms Lost (T2<T1): Two cases

**Frantire**: reconstruction of union in relation to other unions (↑ proximity); entails changes in relationship to externals (↓ larger union, ↓ community) & to members (↑ deliberation); but shock from another site closure introduces ↑ conflict between unions, ↓ representative capacity, ↑ external union roles, ↑ fragility

**Amertire**: forced experimentation in the face of hostile management, increased distance from management, draws on external union models & resources, becomes leader and not lagger in external coordination, enlarged definition of interests; but this transformation is undermined by internal conflict around hostile employer action and the inability of a new leadership to frame the change and to engage in deliberative work with the membership = reconstruction of union in relation to management (↓ proximity); entails changes in relationship to externals (↑ larger union, ↑ community) & to members
Key Findings IV: Core Reflexive Processes

• **Practical dialectic** between work on union self and union repertoires, mediated by strategic and representative capacity; which comes first = varying sequences

• **Strategic capacity**: unions carve out strategic (critical) space relative to management; engage in boundary-spanning beyond institutionally prescribed roles (network embeddedness, articulation)

• **Representative capacity**: change in relationship with members; cohesive leadership group facing opposition from members = risk; seek to preserve precarious equilibrium between older and newer referential unionism; most likely successful if leadership can create strategic space relative to management

• Collective identity: the enhanced representative capacity permits work on collective identity, notably through changes in repertory and strategic capacity
Key Findings V: Take Aways

→ No magic recipes for self-transformation ≠ universalistic
→ Continuous tensions between older & newer referential unionisms: conscious management of these tensions by the leadership group; legacies of older references, embryos of newer references?
→ Renewal of key relationships: to employer, to larger union, to community, to members
→ Shifts & enlargement of repertoires of action
→ Enhanced representative capacity and shifts in repertoires facilitate shifts in collective identity over time
Key Findings VI: Take Aways

→ **Representative capacity**: conscious reconstruction of leader-ship group; centrality of *deliberative processes* & willingness to take on membership on key issues

→ **Strategic capacity**: capability of leadership group to navigate and structure these changes; willingness to take on risk