Union Representatives in Labour–Management Partnerships: Roles and Identities in Flux

Denis Harrisson, Mario Roy and Victor Haines III

Abstract

This study examines the challenges met by union representatives (URs) who have to reconstruct their traditional role in the context of labour–management partnerships. They are innovators involved in the transition to renewed labour relations. Identity issues and role conflicts are examined through an in-depth analysis of the process involved in assimilating this new role in unionized organizations. The results suggest that URs subordinate the partner role to the interest representation role. Interviews suggest that this enhanced union legitimacy. Some blurring of traditional social categories such as those of employee or employer is possible to the extent that the relations between the actors are founded on interpersonal relations.

1. Introduction

North American labour–management partnerships set in motion an innovation process through which the roles and identities of those involved are challenged and reconstructed. For union representatives (URs), the critical issue is not so much about getting involved or not in such partnerships, but rather how far to travel down the path of co-operation (Fichter and Greer 2004). It would seem that they must find a way to position themselves as best they can so as to play a proactive role in this initiative. Some adapt and establish new networks and develop new democratic practices as they reconsider the social basis of their organization (Frege and Kelly 2004). But in the process they also find themselves challenged as they try to balance their traditional role of ‘defender’ with that of ‘partner’.

Our study examines the reconstruction of the role played by URs in the context of labour–management partnerships in Quebec. Our objectives are
(a) to define the contours of the new role attributed to URs who are involved in labour–management partnerships, (b) to examine the dynamics of role structuring, and (c) to identify and define their new emerging identity. Section 2 of this article examines the literature on labour–management partnerships and explains how this social innovation represents a new relational basis. Section 3 examines role and identity issues through a multi-method data collection procedure involving several organizations and an in-depth analysis of the process involved within two unionized manufacturing companies.

In case after case we found that the two central dimensions of this new role are prioritized in agreement with the expectations of union members. This may be why the URs in our study experienced very little role conflict as they gave precedence to defending the socioeconomic interests of their constituents over their involvement as a ‘partner’. This study also sheds some light on the process of identity construction in the context of labour–management partnerships (Clegg et al. 2007; Cornelissen et al. 2007; Hogg and Terry 2001; Sveningsson and Alvesson 2003) — a consequence of the blurring of the distinctiveness between tradition and innovation. One important conclusion is that the context of the partnership needs to be taken into account to understand this process. Indeed, the labour–management partnerships we investigated resulted from voluntary action at the organizational level without the institutional endowments provided either by legislation or a legitimized labour–management partnership framework within the national industrial relations system. With this in mind, three research hypotheses guided our investigation. First, that union officials who get involved in such labour–management partnerships see their role undergo important change. The identity of URs is built up from both their role as a defender of the interests of their constituents and from the new relations established with the managers. Second, consistent with studies conducted by Rubinstein (2001a,b) and Rubinstein and Kochan (2001), that the participation of URs in managerial decision making increases accountability and requires that they balance their role as a partner with the responsibility of defending their members’ socioeconomic interests. Third, that this identity is fraught with ambiguity in the process of identity making as the role of URs is enacted with both the acknowledgement of the firm’s interests as well as those of union members. There is a blurred identity as innovation challenges the traditional role and identity of URs. In the next section, the literature on identity and roles is reviewed in the context of labour–management partnerships.

2. Labour–Management Partnerships, Role and Identity

Partnerships refer to agreements between competing actors who deliberately choose to co-operate instead of maintaining adversarial relations. The scope of labour–management partnership arrangements can be quite broad (Frege and Kelly 2004; Geary and Roche 2003), and power relations can be situated anywhere along a continuum ranging from domination to trust (Ospina and Yaroni 2003; Tomlinson 2005).
Labour–management partnerships enrich the process of union renewal as they change the meaning of collective action (Behrens et al. 2004) and modify the locus and distribution of authority within the workplace (Poole et al. 2001). They owe their existence not only to the presence or absence of constraining political and institutional provisions (Turnbull et al. 2004), but also to the capacity of the labour movement to mobilize its own resources (Eaton et al. 2008; Greer and Hauptmeir 2008). Considering that union members express a high degree of trust in their managers in workplaces where there is a balance of power between management and the union (Bryson 2001; Kelly and Kelly 1990; Martinez-Lucio and Stuart 2002), labour–management partnerships may thereby improve organizational functioning through active participation in matters such as productivity, quality, delivery schedules, responsiveness and flexibility.

Numerous factors allow strong labour–management partnerships, including the full recognition of the autonomy of parties and of their interests and needs, clear role definitions, mutually beneficial co-operative practices (Arthur and Kim 2005; Eaton et al. 2004; Guest and Peccei 2001; Haynes and Allen 2001), strong management and union leadership (Heery 2005), common values and goals, a formal partnership agreement (Chartrand and Ward 2000; Kochan 2008), access to information, training and involvement of members, influence in the decision-making process at various levels (i.e. strategic, functional, operational), and a balance between co-operation and conflict (Frost 2000, 2001; Harrisson et al. 2001). Such partnerships are also stronger when they are part of a system of innovation that might include work teams and various employee involvement programmes (Eaton et al. 2008).

For Rubinstein and Kochan (2001), a new model of unionism would allow URs to participate in the management and governance of firms while requiring that they continue to effectively represent their members. Considering that functional labour–management partnerships are founded on the competent involvement of union leaders, there is a need to acknowledge and indeed further investigate their role in such arrangements. In particular, the role of URs engaged in such partnerships may go through extensive modifications in relation to union constituents and employer representatives. Few studies, however, have focused on the abilities that enable URs to be considered credible leaders in the context of labour–management partnerships. The concepts of innovation and identity are leveraged here to deepen our understanding of this new model of representation.

URs in labour–management partnerships are innovators in the sense that they can interpret and reconcile two seemingly contradictory models of representation. The first is an institutionalized one that implies adversarial relations with managers. Their identity in this model is based on the representation of socioeconomic interests of the rank and file through collective bargaining, taking action according to the rules set by the collective agreement. For Friedman (1994), this role consists of representation at the ‘frontstage’, with few ambiguities. The second model of representation

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engages URs in managerial decision making and problem solving for the betterment of organizational functioning. Their identity in this model is not as clearly defined as they engage in a tortuous process of innovation.

Innovators are recognized for their ability to actually go against the institutions in which they work (Alter 2006). They are able to convert, convince and persuade while not being too sensitive to the judgment of others. They find criteria by which to validate their differing viewpoint with the intent of being cognitively coherent and thereby avoid role conflict. For innovators, what matters most is being consistent with an approach that makes it possible to adopt new values and project a vision of the future that can then be integrated by other actors, following a process of learning and experimentation (Callon 1992; Fagerberg 2003; Hollingsworth 2000; Klein and Harrisson 2007; Martinelli et al. 2005). The innovators who succeed in making this transition are considered ‘heroic entrepreneurs’ by their constituents. Failure, however, is met with rejection on the grounds that their actions do not comply with the system of rules they sought to transform.

With regard to innovation in the field of industrial relations, research informs that URs pursue many goals that call upon new patterns of behaviour. Creativity, in such cases, occurs when action deviates from the learning of the past (Greer and Hauptmeir 2008). However, by so engaging in innovation, URs might be giving up part of their long-standing identity. Their network of interactions, more dynamic, requires more face-to-face communication, akin to the ‘backstage’ mode of representation reported in research on traditional labour relations (Friedman 1994).

Based on a defined and recognized set of rights and duties, a role involves expectations that others develop for an actor with a particular status (Brickson 2005; Goffman 1959; Sveningsson and Alvesson 2003). In the context of labour–management partnerships, URs may find themselves in a situation of role conflict that involves meeting incompatible and irreconcilable expectations (Ashforth et al. 2000; Brickson 2005; Settles et al. 2002). This is because URs are involved in a process of creating a new ‘role-set’, which distances itself from the former, more monolithic, simple and linear role. The new ‘role-set’ is complex and calls for transitions not yet fully understood. Some expectations are acquired within a highly institutionalized framework while others are new as they are produced through a process of social innovation. Those relating to the role of partner are not clearly defined as they are constructed through numerous interactions with management representatives. Although this new role may appear to represent a clear departure from the role of defender from the perspective of an outside observer, in practice, it is not so clearly delineated (Eaton et al. 2008; Fichter and Greer 2004; Martinez-Lucio and Stuart 2002; Sheanan 1997). The identity of URs initially develops through interactions with constituents, the base of the union organization, and then through interactions with managers. This identity will then continue to evolve through new collaborative interactions with both union members and managers.
In partnerships, unions are prompted to question production processes, work methods, procedures, technologies and delivery schedules for goods and services. In return for this involvement in the business, unions gain greater influence over aspects related to employment, the quality of work life, wages, working conditions and occupational training. As such, interest in this new role stems from the opportunity to improve work conditions (Martinez-Lucio and Stuart 2002; Sheanan 1997). An unintended consequence, however, is that labour relations become more complex as they integrate matters that largely extend beyond the playing field of working conditions and compensation. In addition, unions must balance conflict and cooperation in their relations with management (Eaton et al. 2008). Employers, on the other hand, seek to change the work organization through the use of multi-skilling and functional and numerical flexibility. In this context, unions share information with the employers, committees are formed to enable co-operation when changes occur, and direct communication with workers and unions are encouraged.

The notion of identity is important for understanding the meaning of action, the commitment of actors, the rationale behind decision making, stability and change, the relations between the members of a group and, subsequently, between the groups that make up an organization. Identity gives meaning to the collaboration between the actors (Ashforth and Mael 1989; Ashforth et al. 2000; Humphreys and Brown 2002; Sveningsson and Alvesson 2003). The identity of URs is constructed through the different roles they play and these roles are eventually internalized and normalized, but not without ambivalence, a distinctive feature of roles in modern organizations (Caldwell 2003; Vanssell et al. 1998). The recognition of role ambiguity, that is, of roles which are expressed through the coexistence of trust and distrust on different issues, leads to better knowledge of identity transformations. For Lewicki et al. (1998), this ambiguity is explained by the simultaneous desire for proximity and distance. In organizations, interpersonal relationships are very close, if not familiar, and are based on the growing complexity of the social context of relationships characterized by continuous change, information overload and role conflict. These relations become normalized within the framework of complex relations in which an individual’s knowledge and perceptions of others are transitory.

Identities are therefore formed through the social practice of intermingling involving the inseparable themes of differences and similarities (Jenkins 1996: 90). Modern identities are not fixed; they are ambivalent and flexible as they adapt to antagonisms (Cornelissen et al. 2007). These new identities do not have as clear a demarcation as do identities in the institutionalized world from which they have emerged (Michael 1996). Actors may belong to several communities, and this forces them to achieve some cohesion between these diverse forms of belonging (Ashforth and Mael 1989; Tajfel and Turner 1985). The identity attached to being a partner is certainly not exclusive and is rather elastic in terms of its boundaries. This modern identity presumes that individuals possess values and allegiances to a community, and that their
identity is formed through exchanges with others. The conception of URs as partners is in keeping with the idea that modern identities are vague and unstable (Sveningsson and Alvesson 2003). They result from a constant effort by various actors to achieve coherence with their social environment.

Our research highlights the creation of a new identity that stems from two distinct and potentially opposing sources of legitimacy. Drawing from social identity theory (Ashforth and Mael 1989; Tajfel and Turner 1985; Turner 1985), this dual identification suggests a blurring of the traditional categories of management and workers or capital and labour. This blurring of identities stems in part from a shift in the competitive environment as the companies we investigated had in common an emergent external competitive threat. As a result of increasing competitive pressures, over time, management was no longer considered the out-group, but rather the competitors were (Kelly and Kelly 1990).

3. Methodology

A qualitative field research study was conducted using an approach rooted in the realities of the study participants (Miles and Huberman 2003; Strauss and Corbin 1997). Data were collected over a period of approximately one year, using a multi-source, multi-method strategy in order to increase the robustness of our results. First, an advisory committee was created, made up of officials who were well informed about the experiences of labour–management co-operation in Canada and Quebec. This committee included two representatives from the private sector who were involved in labour–management partnerships, one representative from the Confederation of National Trade Unions, two representatives from the Quebec Ministry of Labour, and an observer from Human Resources Development Canada. About 20 organizations were then identified as meeting the criteria for participation in this study. This type of deliberate sampling was necessary to bring together key informants on a complex and little-known phenomenon (Strauss and Corbin 1997). Table 1 details the distribution of respondents at different stages of our research.

A one-day workshop was held to explore the challenges encountered by both management and URs in exercising their roles in labour–management partnerships. To participate in the workshop, both parties from each establishment had to agree to participate and share their experience with the other firms present. Eight firms agreed to this and were available to attend the workshop.

A first analysis of discourse was conducted based on the information shared during this one-day workshop. We then conducted in-depth case studies within two participating organizations; both having experienced relatively successful labour–management partnerships. They did, however, present various contrasts. One was a medium-sized firm operating in the
### TABLE 1
Research Participants

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<tr>
<th>Sources</th>
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<th>Initial interviews</th>
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<td>1(^a)</td>
<td>3(^a)</td>
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<td>1</td>
<td>1</td>
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\(^a\) The same person was interviewed more than once. The total shows the number of different participants.
agri-food processing sector, and its partnership experience was relatively new (three years). The other was a larger firm operating in the energy sector with a long experience of labour–management partnership (more than 10 years). In both organizations, the data were collected from a deliberately stratified sample of more than 20 people made up of management representatives, union officers, middle managers, employees and external union staff that had been called upon to intervene in these establishments. Participants in the study were selected so that a diversity of viewpoints on the subject could be obtained, including those of participants who were not much in favour of partnership.

Data were gathered through semi-structured interviews based on a list of questions that were custom-designed for the project and adapted to the profile of each respondent. The themes and subthemes covered allowed the respondents to report on their experiences and share their opinions about the union–management partnership in their organization. Questions addressed the reasons for the partnership, the practice, benefits and difficulties of the partnership as well as the role changes in the relationship with the partner and the constituents, and the difficulties associated with this new role.

This allowed the research team to note and assess the importance of the themes revealed by the discourse of the participants and reconstruct their representation of the partnership based on their experiences (Allard-Poesi et al. 1999). The recorded interviews were conducted in their workplaces. After the interviews were written up, the case reports were returned to the participating firms for validation.

In both case studies, the history of labour relations before the establishment of the partnership was relatively troubled and characterized by a level of confrontation deemed to be counterproductive by the principal actors involved. The partnership was viewed as an alternative to the conflict that had undermined the relations between the parties for a long time.2

More qualitative data were subsequently collected through interviews with managers and URs from three other organizations in order to validate the information and determine whether new themes needed to be addressed. The comparison or triangulation of results based on these various sources and the use of different methods were aimed at ensuring that the research data were complete, plausible and credible, and that our results were valid (Guba and Lincoln 1981).

A final series of interviews was conducted with officials from the Quebec Ministry of Labour and Human Resources Development Canada who intervened with organizations in conciliation and preventive mediation.3 The idea was to determine whether the experiences of these expert witnesses were consistent with the results generated from the previous steps. These results were then summarized and presented to the advisory committee for validation before the final report was produced.

The convergence of themes and viewpoints addressed by the various people contacted as well as the redundancy of the information obtained as
the data were gradually collected suggested that the issue, the construction of role and identity of URs, had been effectively dealt with up to the point of saturation (Glaser and Strauss 1967).

4. Results

The first goal of our research was to better define the contours of the role played by URs involved in labour–management partnerships. But before examining such role issues, we need to understand the former system of industrial relations and how it structures roles.

In the labour relations system in Canada and Quebec, workers have a right to belong to a union on an establishment basis (i.e. the certification unit). The certified union is the sole entity that can legally negotiate a collective agreement that contains detailed provisions regarding management prerogatives and worker rights, union recognition, wages and employee benefits (Craig 1988). In 2006, 40.5 per cent of Quebec’s workers were covered by a collective agreement compared to 30.5 per cent of Canadian workers and only 13.1 per cent of workers in the United States (Labrosse 2007). There is a legislative protection of union security in Canada, but the Quebec Labour Code ‘goes further by mandatory checkoff as soon as union certification takes place’ (Hébert 1993: 100). Within this system of industrial relations, the traditional goal of collective bargaining is to secure regular wage increases. It is a ‘job control unionism’ where labour–management relations are characterized by ‘arm’s-length’ transactions. Interactions are channelled mainly through bargaining and dispute resolution mechanisms (Chaykowski and Verma 1992). Although deregulation and the globalization of markets have challenged the stability of this system, the legal framework remains the same.

No formal rule gives the union the right to participate in the management of a firm, except in the area of occupational health and safety where joint committees are allowed at the plant level. However, local trade unions usually obtain informal agreements pertaining to the organization of work. So there is actually continuity in the negotiation of the collective agreement as unions increasingly participate in the development of the firm, even if the roles of defender and partner can seem dualistic. The state does not directly intervene in the private manufacturing sector, but it does support more harmonious labour relations; so, without forcing an agreement, it tries to create the conditions for the establishment of labour–management partnerships (Harrison et al. 2001). The government and its subsidiary agencies strongly encourage co-operation and joint regulation between management and trade unions at the plant level in order to enhance labour relations by integrating trade unions into policy, rather than practising union avoidance. Most companies, however, are not legally obliged to support union involvement; this remains a management prerogative. From this perspective, there is little institutional change.⁴

In the 1990s, the main labour confederations in Quebec adopted new proposals for their members, outlining how they can become leaders in the...
reorganization of work and how labour can be more involved in the management of a firm. Work reorganization and experiments in labour involvement spread quickly from this point on (Harrisson and Laplante 1996). The local actors remain, however, the main driving force in labour–management partnerships as new formal agreements mark a departure from traditional labour relations at the firm level.

With such a major shift in labour relations, one might expect a significant shift in the way URs perceive their role. Interestingly though, the URs in our sample did not perceive significant change in their role. According to these URs, the changes that did occur related instead to the way they exercised or played out their role in a spirit of co-operation with the other party. In so doing, they expressed that:

Each party keeps their powers, their rights really, but we work to find joint solutions that respond to the needs, situations and events that happen, and we try to come to an agreement about the problem. This doesn’t change the sharing of power that’s there. What’s different is the way things are solved, the way issues are moved ahead. (D-S-2)

The URs identified strongly with their traditional role, but not with their role as a partner, regardless of the type of partnership agreement in effect between the parties, form and content being quite variable. In a recent study conducted by the Quebec Ministry of Labour (Bettache 2003), around 40 per cent of union officials stated that their union organization collaborated with employers in order to encourage the modernization of workplaces. According to this same study, ‘the co-decisional nature of discussions is rather limited’ (Bettache 2003: 12); consequently, role conflict is contained. In most of the experiences of labour–management consultation, ‘the discussions are mainly oriented towards examining problems and are dominated by the search for joint solutions’. As in our study, there seems to be a preference for finding solutions to problems together rather than engaging in co-decision. Thus, a clear distinction is maintained between the employer’s management rights and the union’s rights of representation; albeit a co-operative attitude is advocated in such labour relations. Adopting a project and common goals and, for some, the presence of a written agreement, was not perceived as having a significant impact on their role.

Thus, our content analysis suggests that the traditional role defined by the legal framework remains the central and overriding role; the only role which is really acknowledged as legitimate, which confers the basic identity. Concurrently, in a context of increased competitiveness, members of the labour–management partnerships we studied consider that the obligations and the interests of those they represent are better served when both parties work together instead of maintaining relations based on adversity, a position acknowledged and reviewed by Frege and Kelly (2004). Implicitly or otherwise, each party recognizes that it needs the other in order to succeed.
Strengthened by this conviction, actors pool together their common values and goals to work on any matters that can be subject to a partnership agreement. Although participation of the union and its representatives in the functioning of the firm can become highly developed and affect a wide range of organizational issues, it does not challenge the fundamental role of each of the parties.

The redefinition of the URs’ role in the context of partnership did, however, give rise to debates within the unions about the URs’ basic identity and the strength of their feelings of belonging to the core group. The concern was that those representing the union might be giving up their fundamental role in order to get closer to management.

We have the feeling that we’ve got to the point where the partnership is so strong, we always agree, we no longer even disagree. If the boss says go there, we go there. [. . .] I have the feeling that the partnership has got so strong that I say to myself — and I’m not the only one — that the union is no longer in a position to defend me. (G-S-5)

If the URs lose sight of their main commitment, or if they appear to stray a bit too far from it, the constituents make it their duty to remind them. This reaction may go as far as to compromise the re-election of the union official. The URs are, in a way, continuously seeking a balance between partnership and the strong representation of members.

I am aware of the employer’s needs but I also know that I do not want to lose everything on my side only. If I suggest that my guys accept everything because we are practising labour–management consultation, I’ll be shot. (B-S-1)

The URs refer to their values, convictions and personal principles to describe the reasons for their support of the partnership. These values emphasize co-operation with opponents as ‘frontstage’ action in order to influence management, to protect jobs and to improve work organization. They are, as such, wholly compatible with their vision of the role they play, and the transition to partnership is seen as quasi-natural for leaders of the new approach. What does change though are the relations with the ‘other’, which are established on a much more personal basis rather than merely on the basis of decreed institutionally determined roles. The individuals get involved while the roles remain the same. For this to work, however, the representatives of the other party must get personally involved to the same extent.

Over time, our relations became familiar as we engaged in conversation on an ongoing basis. For sure, the more we talk [. . .], the better we get to know each other. (L-P-1)

We began addressing the real issues, those things that were going wrong; when and where they were occurring. Everybody got involved in the process. Sure, some of the things we said might have hurt a little, but they were always said in a way that was respectful; because, for me, a partnership is about respecting individuals. (A-D-1)
For all the interviewees, partnership refers to the respect of an agreement based on good faith between the parties. The change, therefore, is in the way the UR’s role is exercised, based on the shared values of respect, transparency, honesty, commitment and co-operation. The parameters which guide the exercise of this role are thus personal rather than institutional, and based on trust, as described by a UR:

There’s a huge bond of trust there because we can now get information that’s confidential; information that we never got before, and they trust us enough to give it to us. That means a lot. (G-P-1)

In the context of a partnership, the identity of each party, it seems, is strongly preserved even in a context of shared values and convictions. The mutual commitment to a partnership is based on respect for differences rather than on a convergence of roles. Each party knows how to keep its distance in order to guarantee the protection of its members’ interests in its own eyes and in those of the people it is representing. As we will see, the exercise of the power linked to the respective roles can be rearranged, but this does not alienate or violate in any way the fundamental rights of each party. The UR can share power and work hand in hand with the other party, provided that this sharing of power is the expression of their own volition and not in any way the expression of submission. A distinctive and non-blurred identity in the role of representation is necessary for the expression of a strong and independent will in a union–management partnership. It is the condition that allows URs to be at ease defending the rights of workers on the one hand, and exchanging information with managers about the organization of work, on the other. Recognizing the different roles played by each of the parties certainly helps to mitigate the emergence of an identity crisis.

In the context of a labour–management partnership, it would seem the URs’ role is played exactly the same way when there are a ‘frontstage’ and a ‘backstage’ as explained by Raymond Friedman (1994) about the negotiators. The light is now projected on both stages and the actors should play in a transparent way. So it is difficult for URs to be slacken. As such, if the role does not change, then it is the way this role is played which changes. This subtle differentiation is examined in the following paragraphs.

The way this role is played changes because the partnership involves behaviour and strategies that are completely different from those of the traditional approach. The role becomes more complex because it is now necessary to take heed of factors beyond the collective agreement, without, however, discarding it. The role involves seeking consensus without abandoning the traditional means of making demands if they are necessary regarding matters for which consensus is not workable.

Compared to the traditional approach, the principal changes observed in the way the role played by URs is exercised in the partnership approach can be found at three levels as shown in Table 2.
There is a joint agreement on the way problems are solved. Many actors emphasized the importance of dealing with problems together and reaching a consensus. When this is achieved, exercising the UR role no longer involves merely making demands as a reaction to the managerial position but, rather, seeking solutions together and being responsible for making them work as mentioned by URs:

For example, talking about multi-skilling [. . .], [we] sat on [our] side with our people and talked about what we could improve [in the] area [of] performance. [. . .] The union helped a lot in analyzing the tasks and how to organize them. (G-P-1)

Nevertheless, when an employee feels that some rights have been infringed upon or is subject to a disciplinary measure, the union’s role remains that of defending that constituent. However, instead of systematically filing a grievance, this might be done by working with management to find the solutions that are most satisfactory to all.\(^5\) This requires a special effort in analysing the problem in order to ensure as much objectivity as possible and avoid slipping into partisan biases. The goal is still the same, but the actions related to exercising the role change as a partnership is introduced. The URs take this into account and respond accordingly to the requests made by the managerial partners. URs must also take into consideration the representations of constituents, and it is with them that the boundaries of a new identity are formed.

At the centre of the labour–management partnership is a redefinition of the spheres of interaction and influence between the parties based on a set of issues which are shared and which are central to the firm’s life, such as

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<th>Levels</th>
<th>Traditional approach</th>
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<tr>
<td>Level of relations between labour and management</td>
<td>Low trust, Secrecy, duplicity and concealment, Vulnerability to mistakes strengthening the other party</td>
<td>High trust, Openness, transparency and honesty, Right to make mistakes</td>
</tr>
<tr>
<td>Level of problem solving or decision making</td>
<td>Definition of stand, Confrontation or arbitration, Negotiation based on positions, Partisanship, Arm's strength interaction, Framing situations in the context of rank-and-file demand, Highlighting one's viewpoint and tarnishing viewpoint of the other</td>
<td>Quest for consensus, Co-operation, Negotiation based on interests, Search for objectivity, Dialogue and search for solutions, Reframing situations in the context of a joint project, Highlighting both viewpoints on situations searching for a new balance between the interests of both parties, Mobilizing to increase the participation of constituents in the joint project</td>
</tr>
<tr>
<td>Level of dynamics with constituents</td>
<td>Mobilizing to increase the enlistment of the members backing the union demands</td>
<td></td>
</tr>
</tbody>
</table>
training, work organization (e.g. flexibility, multi-skilling, accountability, internal communication and the introduction of new technologies). This redefinition is generally part of the partnership agreement (Bourque and Rioux 2001). Despite this obvious clarity, a partnership remains a more nebulous sphere than that of traditional labour relations, as stated by one UR:

I’d say that partnership is less clear-cut. It’s more vague [. . .] it’s not defined by clauses. There’s always room for change [. . .] Issues aren’t as clear as they are with traditional negotiation. (G-S-3)

This redefinition of the spheres of interaction and influence gives union officials access to matters that were usually under the umbrella of managerial prerogatives. For URs, these are new topics, the issues are not clearly delineated and they have to learn how to play this new segment of their role. Thus, union action is modified through this redefinition and is no longer limited solely to defending the working conditions of members but is enlarged to include promoting the smooth operation of the firm, client satisfaction, development of new markets, profitability, new technologies and work organization. It no longer involves making demands but rather being a stakeholder in seeking solutions or in decision making. This increase in union influence over the functioning of the firm makes the union and its representatives morally accountable with regard to, in particular, employee support for joint decisions or solutions for their smooth implementation. According to URs, this shift from making demands to being accountable also constitutes a major change in the way their role is exercised and in the relation between the parties. The UR’s identity thus becomes twofold with all the difficulties this may involve. It is based on communication and trust between the parties and on an agreement that includes new spheres of interaction and influence as well as of new operating rules for problem solving. It also consists of developing new skills in the areas of problem analysis, decision making and teamwork.

It goes without saying that the relation of trust and transparency that is developed with management must spread to all union members. These constituents are not always willing to listen to both viewpoints, especially if they feel that management’s viewpoint on a given matter is not legitimate or might negatively affect their interests. Thus, the URs must strive to involve the constituents, to foster their participation in solving problems not only within the union structure but also in consultation with management. This is achieved with decentralized decision making away from top management. The changes in the way the URs’ role is played are thus just as significant in their relations with the constituents as in their relations with management. The most important change is a stated need for greater impartiality on the part of the URs in dealing with problems and an ability to view situations from several perspectives in order to take the interests of both parties into account. There are also some clear expectations from managers as illustrated in the following excerpt:
If I commit to a decision, I want to feel the same level of commitment from the other side. If we work together, and I’m clear about my intentions and call things as they are [. . .] I must feel like the other is acting the same way. (B-G-2)

The URs become generators of solutions to problems related not only to the application of the collective agreement but also to the organization of the work. This is a new model of problem solving, one that is less institutionalized. They must rally their members around the new approach instead of making demands or taking an opposing stand. Our findings further suggest that they also need to seek to rally the opponents through an informative and educational approach, which involves convincing their constituents that the new approach provides better guarantees for protecting and defending their long-term interests than the traditional approach constructed on the basis of confrontation. Management representatives also modify their managerial approach in order to make considerable room for the greater influence of union officials in the decision-making process. They also engage in the art of compromise.

There is, however, another side to the coin. Some union members think that their representatives should not go so far in representing managerial positions. They at times decry the lack of transparency in decision making. They sometimes feel that they are faced with solutions that have been ‘pre-packaged’ by the parties. The fact that familiar ties develop between the representatives of both managers and employees and that the locus of discussion and agreement is often informal, leads some opponents to question the process itself. Closer ties may prevent the URs from having an accurate picture since managers always know more about the firm’s projects than they do. However, union members analyse the new situation with caution, as is stated in the following excerpt:

For 15 years, there’s been no conflict, so there’s been no need to cultivate activism. Mobilization happens when you get to the picketing line. But as long as you don’t get to that point, people remain quite indifferent. A negative aspect of this is perhaps that we let our guard down [. . .] As a union, we’re very open to managers, to the company and its habits. But if a new CEO were to arrive with a new team [. . .] a new philosophy, well we’d get taken to the cleaners for everything [. . .] we’re vulnerable [. . .] we’d lose out because we’re not ready to face anything. (G-S-1)

Both labour relations approaches involve different convictions, and each approach has its proponents and opponents. The URs must feel comfortable with both approaches. This implies making difficult choices. The executive committee must demonstrate that it can rally strong support while exerting some control over the ‘traditionalists’ as stated by one witness of a stormy union meeting:

The President went to the absolute limit, just a few votes away from losing his office. It was really close. He went to the utmost of his convictions. [. . .] There was
no longer anyone who asked if the President [of the union] was serious about this. He risked it all. (G-S-2)

This new way of exercising the role does not preclude going back to more traditional mechanisms when, for instance, dealing with some grievances or when the interests of one of the parties are seriously threatened. The URs acknowledged the coexistence of both co-operative and adversarial labour relations. Their role clarity, however, was not always reflected in the perceptions of their constituents, as illustrated in the following criticism leveraged against them:

I think that, at some stage, they mix up the goals of the company and the people they represent. [. . .] I have the feeling that sometimes, well sometimes I feel that the goals they’re defending are corporate goals. [. . .] That’s because, in the partnership, the union has to defend the goals of the company. (G-S-5)

However, despite comments such as these, employees also reported that their interests were generally well represented and that they did not wish to go back to a traditional approach. Some constituents, however, urged the URs to distance themselves from the experience of partnership and implored them not to venture too far into it. But, as one employee wondered in the following excerpt, how can they avoid it?

[before] when we wanted to change the inspection sheet [. . .], we got together, we worked out a kind of consensus, then the delegates went to present what we had decided. It’s not like that anymore. Now, the delegate and the representatives of the union are with the employer. They decide. They come to see us. Sometimes we don’t even know what they have discussed. Afterwards, they come to see us and say: ‘Well, now here is how it’s going to work.’ So, who are they representing? (G-S-5)

Although there is no clear evidence of role conflict, this does not prevent the URs from having to manage ambiguous situations that are likely to create great tension because, by co-operating with management on a series of matters that used to be outside their realm of influence, they end up sharing in the success or failure (shared accountability) of the action of the firm. For the members, their leaders’ interest in the success of the firm can at times appear to be partial and create suspicion about the way their representatives behave towards them and towards management. Our results further suggest that, to avoid the experience of role conflict, labour and management representatives use a wide range of strategies to help prevent uncomfortable situations; in essence, they identify and understand the limits and boundaries of the roles of each party. Moreover, URs are not left alone to cope with this potentially uncomfortable situation; they receive assistance from their partner who understands the need of avoiding any appearance of conflict such as mentioned by one manager:
on the shop floor, we have demonstrated our ability to work together and present our solutions together [...]. We pay attention to the message and show that we are not in conflict. (D-D-2)

To sum up, URs did not express any signs of role conflict. Although the role of the UR is enriched through a broadening of the areas open to discussion and influence, the fundamental role remains the same. It is the way the role is played that changes. The URs expressed the tensions produced by their efforts to reconcile the expectations, goals and interests of both the union and management while seeking to maintain a strong link with their constituents so as to be able to effectively promote and defend their interests. When URs move too far away from the grass-roots level, they may lose the legitimacy since the majority of members prefer representatives who are more independent from management. This is a consequence that limits the extension of the partner role. Nevertheless, the URs did not consider that such tensions constituted role conflict, and they did not see themselves as being in a situation of role conflict. To prevent such potential conflict from emerging, they sometimes went as far as partially or totally withdrawing from the partnership agreement as shown in the following situation.

In one of the case studies, management was demanding job cuts as a solution to profitability problems but without providing the union with all the information related to the real costs, which would have helped to justify these cuts or allowed for a re-examination of the problem on a common ground. In this case, the agreement was broken because the representatives of both parties were not able to maintain sufficient mutual trust to settle these problems together. When a major disagreement arises and a consensus is not possible, and the decision to be made is likely to greatly affect the interests of one of the parties, the parties tend to change their approach by shifting from co-operation to the recognition of the conflict, and the reinstatement of power relations. Consequently, the union opted for a conflict strategy and the dispute was quickly settled.

It’s not easy to sit down and try to find a real solution that will do for both; it’s the most difficult way to work. The easiest way is to say: ‘I do my job, and you do yours. Since we can’t agree, let’s leave it for someone else to decide.’ And sometimes, this has to happen. (D-P-1)

Moreover, if the tensions between the approaches are put back into the broader context of the current institutional framework, the opponents of a partnership approach are a priori better equipped to push back the implementation of this approach. However, the new economic realities, which put pressure on firms and force them to be more flexible and to be able to adapt and renew themselves continuously, create a local context, which is conducive to these experiences. This is not easy, as is shown by the following comments made by various respondents highlighting the great fragility of partnerships and the considerable difficulties experienced by URs:
‘It’s fragile.’
‘We’re walking on thin ice.’
‘We have a mandate from our members but any little thing can make the whole thing explode.’
‘It’s easy to slip up and lose their trust.’
‘It makes life complicated, that’s for sure!’
‘We can lose our credibility.’
‘The union is often attacked from all sides, we always have to do the convincing.’

One of the challenges most often mentioned is that of bringing the partnership down to the lowest levels such that this approach can permeate the culture of the workplace. When this is achieved, the values shared by the UR and the constituents strengthen their ties and pave the way for the development of a clear identity because the UR is no longer excluded. Thus, the transition can be successfully achieved if the difficulties are resolved.

Partnership gives rise to a fundamental transition to an approach that requires numerous levels of analysis in order to identify the various difficulties which may be encountered in practice and which may have an impact on the UR’s identity. Based on our examination, these difficulties relate to (a) trusting people who have often been seen as adversaries; (b) adapting to a radically different approach to labour relations; and (c) managing tensions in order to strike a dynamic balance between often contradictory viewpoints. These three difficulties are central to the way the new role is exercised and to the identity of a UR in a context of partnership, and they require major changes on the part of a union official who decides to engage in such an experience. URs must be able to rely on the collective identity and the cohesion of union members. This internal solidarity requires a high and sustained participation on the part of members in the life of the union and the presence of numerous delegates locally.

5. Discussion

In this investigation, the way the role is played by URs was considerably transformed, albeit with very few indications of role conflict. This raises questions about the identities that develop along very different paths within the same institutional framework. Although the redefinition of the spheres of interaction and influence may at times provide URs with considerable influence over the functioning of the firm, this new power is also expected to more effectively serve the interests of their constituents (Behrens et al. 2004) and thus allow them to better play their traditional role. This role enlargement confers a new identity to the extent that the new responsibilities and duties are compatible and coherent with the traditional role, the one with a firmly established institutional grounding. Role ambiguity may exist, caused by expectations of both confrontation and collaboration (Caldwell 2003; Settles et al. 2002; Vanssell et al. 1998), but role conflict is minimized as it is tempered through different strategies.
From the URs’ perspective, it is not incompatible to construct a new identity that feeds on co-operative interactions with management and more tumultuous interactions with the constituents, since the new framework is presented to and must be accepted by the union members as an acceptable innovation. Although the URs do not, in entering into a partnership with management, disown the base to which they belong, they must nevertheless deal with new contextual elements by giving up their traditional way of playing their role in a temporary and transitory manner in order to innovate and introduce new activities. They will succeed, our findings suggest, to the extent that their role as a partner is incorporated as a subsidiary role. In the Quebec industrial relations system, institutionally determined roles do not provide much leeway for a voluntary role such as the one played by URs involved in labour–management partnerships. This new role is able to emerge because of the voluntary actions of some innovators who enjoy the status and who agree to play the role according to the new operating rules established between the union, the employer and the constituents. It is the traditional role that paves the way for the transition from representation to partnership. This may be why URs prefer to deal with the issue from the perspective of an enlarged role rather than from that of a role transition. The URs in our sample did not trust managers unconditionally. In fact, by maintaining the traditional role and the possibility of returning to adversarial strategies at any time in case of a breach of trust or a failure in developing a common project, as was seen, the URs we studied never lost sight of their original identities, which confer on them the status of belonging to their group of constituents while distancing themselves from management (Ashforth and Mael 1989; Ashforth et al. 2000; Cornelissen et al. 2007; Sveningsson and Alvesson 2003; Tajfel and Turner 1985).

The blurring of the distinctiveness between traditional social categories was clearly a factor in this study. Another antecedent of the observed dual identification was interpersonal liking, a factor traditionally associated with group formation (Albert et al. 2000; Ashforth and Mael 1989; Jenkins 1996; Michael 1996). The commitment of union and management leaders to the partnership and their obvious positive interactions suggest interpersonal liking as a facilitator of the dual identification with both management and union groups.

The blurred situation we observed in this study was not totally disorganized since the union identity had precedence over the management identity. Union structures have a long history while partnerships stem from sudden changes in the competitive environment or various management fads. As a result, the blurring we observed is actually structured in a way that if the motives for management identification fade away over time, union identification remains the more permanent fallback position. As such, the blurring of the distinctiveness between traditional social categories often observed in organizations (Ashforth and Mael 1989) could actually be qualified ‘structured blurring’ in the case of URs involved in union–management participation.
These results are consistent with the findings of many researchers about the difficulties URs face when called upon to help address management concerns, while at the same time continuing to play their conventional role (Eaton and Rubinstein 2006; Eaton et al. 2008; Martínez-Lucio and Stuart 2002; Sheanan 1997). A labour–management partnership can be a renewal strategy for trade unions, if it is understood as a complementary strategy with some other forms of renewal such as union solidarity, international activities, connection with community-based organizations and so on (Fichter and Greer 2004). It is also important to consider these results in the Canadian institutional context in which labour–management partnerships are embedded in a society on the move from a co-ordinated market economy to a liberal market economy, using the categories of Hall and Soskice (2001) taken up by Behrens et al. (2004).

6. Conclusion

This article reported and discussed the results of an investigation into the transformation of the URs’ role in the context of labour–management partnerships, the factors associated with this transformation as well the process of their identity construction. Our hypotheses are supported to the extent that respondents reported an enlarged role for URs that includes both representing and partnering. This duality was not without role ambiguity and blurring. On the one side, managers require a clear commitment to organizational goals. Concurrently, union members, especially those opposing the labour–management partnership, are quick to criticize URs for their apparent allegiance to the cause of management. Although some tensions were palpable in the cases we studied, the absence of role conflict was intriguing. This is possible if those representatives can achieve a balance between representation and partnering (Rubinstein and Kochan 2001).

We advance such findings with great caution. Labour–management partnerships in Quebec may have particular features that preclude empirical generalization to other institutional contexts. However, from a theoretical perspective, our findings do indicate that the development of a labour–management partnership initiates a role transformation for URs. Indeed, the synthesis of the new role seems to be a work in the making. The identity has not been completely developed, and it does not enjoy the benefit of institutional recognition. Moreover, the sharing of common values with management and the desire to establish co-operative relations based upon personal relations, frequent meetings, and the sharing of information, knowledge, know-how and resources between actors who are used to interacting in adversity, bring these actors closer together. However, every time URs have to choose between their constituents’ interests and a business decision, they walk a fine line. This role ambivalence creates ambiguity in the conception of the URs’ new identity. This identity is vulnerable as the links holding it together are fragile. Since this new identity is developed in response to a
shifting competitive context, it is thus related to circumstances and is transitory and may be ephemeral. It will have to undergo the test of time in order to become consolidated either by taking root in relations that have become routine between the agents, or through state recognition by way of a law or a legislative amendment, which would seal the issue of labour–management partnerships. In this case, the identity of URs would become stronger by virtue of holding two powerful and complementary roles, since such partnerships are made up of equal relations between the stakeholders.

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Notes

1. The committee had two goals. The first was to ensure that our research design took into account the issues identified by these experienced practitioners. Our aim was to bridge the gap which too often exists between academics and practitioners in the development of applied knowledge (Rynes et al. 2001). The second was to gain access to the network of contacts that these practitioners have with Canadian organizations recognized for their experience in labour–management co-operation.

2. It is frequent in the United States as well as in Canada and Quebec (industrial relations are under the jurisdiction of the provinces) that labour–management partnerships are viewed as a reaction to conflict-ridden labour relations. See Kochan (2008) for the United States and Bettache (2003) for Quebec. However, partnerships can only survive if they are viewed as a permanent basis for the relations between the parties.

3. The purpose of preventive mediation is to help parties solve conflicts co-operatively through voluntary participation outside the confines of the collective labour agreement.

4. In 1997, the Conseil consultatif de la main-d’œuvre (The Advisory Labour Board) presented a statement on labour–management partnerships that was supported in Quebec by the main union federations and by the employer association (Conseil du patronat). The recommendations were not enforced by legislation nor by any formal regulation. In 2004, the Government of Quebec asked employers and trade unions to create new conditions for labour–management partnerships with the aim of increasing competitiveness. The Commission that ensued was willing to offer a formal acknowledgement of labour–management partnerships. This recommendation, however, was never applied by the government in any way. Consequently, there is no state intervention in labour–management partnerships except for a strong commitment from the Ministry of Labour. Voluntary initiatives are strongly encouraged and assistance can be obtained to guide the process.

5. This was documented also in the case study made by Rubinstein and Kochan (2001).

6. This was the case at the GM Saturn plant in Spring Hill. The union was opposed to the position of the employer who wanted to manufacture a new car model in another plant. Fearing for the jobs of their members, the union threatened to withdraw from the partnership if GM did not change its position. This gave rise to strong-arm negotiations between the parties, which lasted 21 months, until GM
opted to manufacture the new car in the Spring Hill plant in exchange for certain conditions (Rubinstein and Kochan 2001).

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