

THE ROLES AND FUNCTIONS OF SHOP STEWARDS IN WORKPLACE PARTNERSHIP: EVIDENCE FROM THE REPUBLIC OF IRELAND

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ABSTRACT

This article examines the roles and influence of shop stewards under workplace partnership regimes in five case study firms in the Republic of Ireland. Much of the extant literature tends to focus on the outcomes of partnership in terms of the gains or losses to either management and/or union. Consequently, the capacity for the 'processes' of social partnership to shape the behaviour and role of workplace union representatives has often been neglected in much of the literature. The findings indicate that while union representatives view partnership in a broadly positive light, there remain problems as to the longevity of partnership owing to management control and a disconnection between national (government) and local (workplace) support mechanisms for partnership. The article concludes that social partnership is a process that remains anchored in an antagonistic employment relationship that is influenced by context, union membership strength and management choice.

INTRODUCTION

Commentators make the point that there is no universal definition of partnership (Guest and Peccei, 2001:208; Martinez-Lucio and Stuart, 2002). In practical terms, it is generally agreed that partnership is taken to symbolise a shift from adversarial industrial relations to a system of mutual problem-solving, higher trust and more amenable and cooperative outcomes between unions, managers and workers (Guest and Peccei, 2001; Martinez-Lucio and Stuart, 2004; Dietz, 2004; Roche and Geary, 2006). Policy makers - such as the Trade Union Congress (TUC) and the Involvement and Participation Association (IPA) in the UK, and the Irish Congress of Trade Unions (ICTU), the Irish Business and Employers Federation (IBEC) and the National Centre for Partnership and Performance (NCP) in Ireland - have identified similar bundles of core principles: mutuality; dignity and respect; fairness; competitiveness; flexibility; and joint and direct communication and consultation. The new system of union-management is thus claimed to result in a win-win scenario for all parties involved (Kochan and Osterman, 1994; Ackers and Payne, 1998; Geary, 2008).

However, the premise that all benefit from partnership is hotly contested. Critics have long stressed that unions may ultimately lose power and influence under partnership as activists become incorporated into the higher echelons of management (Kelly, 1996, 1998; Danford et al, 2005), or that the gains tend to exclusively favour management at the expense of workers' job security and pay levels (Kelly, 2004; Martinez-Lucio and Stuart, 2005).

BACKGROUND

The Potential Value of Workplace Social Partnership

The processes of partnership can be crucial to an understanding of the potential longevity of workplace social relations that seek to promote and sustain mutual gains. Of central importance is

an appreciation of multi-level factors: the role of power; the balance of mutuality; agenda-setting controls; union independence; and the value of partnership to the parties. Indeed, it is quite possible that the value for workplace union representatives is connected to the capacity of partnership not only to meet their own needs, but perhaps to a lesser extent, that partnership is seen to also meet the needs of the other party. Evidently, some partnerships offer more value than others, and it is the intent of this paper to explore how and why the processes of partnership may engage workplace union activists to such a relationship.

How partnership arrangements are played-out at the workplace level can be as important as the debates concerning measurable outcomes. Significantly, the dynamics of interaction varies in terms of the scope, depth and breadth of union steward participation, resulting in weak and strong (or robust and shallow) relationships. These, in turn, are likely to affect the postures of union activists towards partnership and potentially the perceptions of union members, both to the union and to the company. Why this approach and the case of Ireland is likely to be a valuable addition to the literature is considered next.

A Framework for Assessing The Value Of Workplace Partnership

The possible values and motivations of partnership includes unions evaluating partnerships in terms of what it can offer them in improving their roles and functions with management and members. A framework to assess such roles is drawn from the extant literature on voice and participation, using a threefold scheme including the 'level', 'scope' and 'depth' of partnership participation (Marchington et al. 1992; Marchington and Wilkinson 2005)¹.

The Republic of Ireland offers a good example in which to examine the roles and behaviours of shop stewards in pre-existing and strong partnership relationships. The Irish system of industrial relations is essentially voluntarist, which utilised collective bargaining as the primary method of regulating the employment relationship. However unlike the UK, Ireland developed a centralised bargaining system in 1987, in which the principle actors (unions, employers, government and other community and voluntary bodies) negotiate national level pay and social welfare provisions. This 'national social partnership' model has been identified by international scholars as a key contributing factor in Ireland's economic and employment growth in the years since 1990 up to 2008 (McKersie, 2006; Teague and Donaghey, 2009).

However, despite the public policy push for the diffusion of enterprise-based partnership, the result is at best a moderate to low take-up in private sector workplaces in Ireland. The most extensive and representative workplace survey in Ireland reports that only 4.3 percent of firms have implemented partnership, with another 19.3 percent reporting they have informal partnership at the workplace level (Williams et al, 2004:56). Thus about one-quarter of organisations report some form of partnership arrangement, and most of these are confined to public the sector. Geary (2008) further scrutinises the same data set, and save for a few leading exemplars of partnership that had collapsed (Aer Rianta, Bausch and Lomb and the State broadcaster RTE), finds a broadly favourable picture for workplace partnership in terms of union influence and union member support. Geary (2008:536) explains that the roles and attitudes of both trade unionists and employers were crucial in promoting a more conducive and collaborative work regime. Such findings lend weight to the purpose of this paper. While survey data and sophisticated statistical modelling can explain important relationships and associations between variables underpinning partnership, the multiple case study approach adopted here seeks to explore the roles and attitudes of local union stewards in an attempt to make sense of the phenomenon they experience on a daily basis. It also complements the limited number of case study assessments of workplace partnership conducted in Ireland (Roche and Geary 2002b; Roche and Geary, 2006; Dundon et al, 2006).

RESEARCH METHOD

Five case studies in the present research have been chosen because they would appear to offer

¹ The framework used here has been adapted and would otherwise include four dimensions. The fourth dimension not included here is the 'form' of participation. The reason this is excluded is because the form is pre-defined as 'indirect', and direct employee involvement mechanisms were not part of the study.

robust partnerships, at least at the surface level. In other words, the selection criteria was to identify organisations that displayed strong partnership relationship and to examine the roles, functions and attitudes of shop stewards in these so-called exemplars of good partnership practice. The cases include private-sector companies that had in place for a number of years formal partnership arrangements, collective bargaining and were known to have high union density levels. The objective in selecting companies that appear to display the features of robust partnership was to be able to subject these exemplars to critical scrutiny. In other words, the study examines the roles and behaviours of shop stewards within a group of social settings that are generally considered to be the best examples of partnership from the private sector in Ireland.

In four of the five case studies union density is near 100 percent, and in the fifth it was reported to be over 75 percent. The partnership arrangements have been in operation from three to six years and collective bargaining dating back to when each company commenced operations in the Republic, ranging from eight to thirty years. Each case is a branch plant of a private sector multi-national organisation, and each reported an independent decision-making structure for the Irish site. The companies span a range of industry sectors including manufacturing, financial services and hospitality with employees from an associated range of occupational categories. The size of firm ranges from 85 to 1600 employees. The data was collected from interviews with managers, shop stewards and partnership representatives. Interviews were held with a total of 34 respondents that followed a semi-structured interview schedule. The research instruments were designed to explore the value of the partnership processes and arrangements across each of the case study firms. Summary details of each case are given in Table 1.

Table 1: Case Study Context and Profile

Company/ Sector	Manufacturing A	Manufacturing B	Manufacturing C	Financial Services D	Hospitality E
Size	555	1600	85	600	480
Unions	SIPTU, AEEU and TEEU	SIPTU and TEEU	SIPTU and TEEU	SIPTU and MFS	
Union density	100% and closed shop agreement	100%	100% and closed shop agreement	94%	75%
Respondents interviewed	Industrial Relations Manager x 1 HR Manager x 1 Plant Managers x 2 Partnership Facilitators x 2 Union Stewards x 5	HR Manager x 1 Partnership Rep x 1 Line Manager x 1 Shop Stewards x 4 Partnership Facilitator x 1	CEO x 1 Site Manager x 1 Shop Steward x 2	Employee Relations Manager x 1 Operations Manager x 1 Shop Stewards x 5	HR Manager x 1 Line Manager x 1 Shop Stewards x 2
Indicative description of type of partnership relationship	Robust	Collapsed	Robust	Robust	Shallow

FINDINGS

The data in this section are structured in two ways. First, the framework of *scope*, *breadth* and *depth* of involvement is used to assess the ability of shop stewards to influence decisions at enterprise level. Second, how the partnership processes shape the roles and relations of workplace shop stewards towards union members and with management is presented.

Shop Stewards' Ability to Influence Decisions

The scope of issues with which workplace representatives were involved spanned low level operational and some higher order strategic areas, although the precise issue often depended on the organisational context and concerns deemed important by the key actors. Of particular importance is how the formal structures of partnership differed across workplaces, which affected shop steward ability to influence decisions. Some firms had clear divisions between 'partnership forums' on the one hand and 'union-management negotiating bodies' on the other.

Union and partnership representatives participated in widely-varied issues, including minor but also quite substantial issues that affected the day-to-day working conditions of employees. At the same time, the boundaries between integrative problem-solving issues and those that were potentially more distributive in nature tended to mean conflicts would surface both inside and outside of the partnership forums.

In addition to the scope of issues is the related concept of breadth of involvement, and union stewards participated in both partnership and industrial relations fora. Breadth here also includes the frequency of dialogue and the extent to which it includes or excludes shop stewards. In all the case studies the data indicates a reasonably wide breadth of partnership involvement. In one respect this confirms that these organisations resembled robust-type relationship. Partnership forums and committees would be attended and often chaired by a senior manager. Shop stewards sat alongside non-union partnership representatives and in four of the firms (Manufacturing A, B, C and Hospitality E). In all the workplaces in the study, shop stewards reported an increase in the breadth of information received from management, with improved two-way communications and consultation. In Manufacturing A, B and C management provided employees and shop stewards with access to commercial information and summaries of the minutes of partnership meetings. Information was widely available and disseminated through the company's intranet, via emails, notice boards along corridors and in factory canteens. Respondents reported that employees had greater access to information and management willingly disseminated messages as a result of partnership. In all the firms, albeit to a different extent, informal 'word-of-mouth' sources were important.

The third dimension of the framework considered earlier is perhaps of greater significance. The depth of union participation in partnership signals, above all else, the extent to which involvement is genuine and whether shop stewards have the capacity to contribute to organisational decision-making: decisions managers normally reserve for themselves. Significantly, depth was found to be very much interconnected not only with formal structures but informal processes of dialogue.

The connection to union channels of dialogue between workplace stewards and managers served as a conduit to information-exchange and consultation owing to a high level of informal dialogue outside the formal partnership mechanisms. This often meant that management and unions would know that an issue that would be raised beforehand. Respondents commented that such informal dialogue helped to speed-up decision-making.

The depth of involvement was often constrained by management. There was an understanding that reports would be presented on business matters, and union delegates felt much of this information was centrally controlled by senior or board members, not local managers. One shop steward in Manufacturing C remarked that information presented by management was felt to be an 'effort in spin-doctoring from above'. Even so, shop stewards viewed the partnership process in a positive light, commenting they could raise problems and workers' concerns in an open and transparent manner. For example, in Hospitality E, the idea of new job sharing options for employees was raised by shop stewards at the request of several members, with a new policy agreed and implemented by management in a matter of weeks. In Manufacturing B, however, tensions were evident when shop stewards sought to highlight a particular membership grievance

that management ruled was inappropriate for the partnership forum. Likewise, with other issues the union was often unwilling to discuss matters it felt were more relevant to collective bargaining fora. Union policies and structures helped ring-fence issues that required more careful negotiation and at times a harder bargaining stance. One of the shop steward's commented:

“So in one sense you are trying to allow the management to hear the realities of what goes on the floor without crossing that boundary because they could be the first to say well we can't discuss this here.”

(Shop Steward, Manufacturing C)

The dynamics of these partnership processes varied in terms of depth of union involvement. It was certainly the case that management often controlled the agenda as to what was open for discussion, and how far the partnership process could contribute. There was an understanding that reports would be presented on business matters, and union delegates felt much of this information was centrally controlled by senior or board members, not local managers. At the same time union stewards were able to derail issues management sought to push through the partnership process when harder negotiation was considered the order of the day.

To this end partnership is far from a mutual win-win concept. While partnership was considered a positive and enlightening process of involvement, it also meant union stewards had to remain vigilant industrial relations actors with clear boundaries between the interests of management and those of their members. For most shop stewards the extent of their role in management decisions covered a broad range of operational and day-to-day work related matters.

At times higher or more strategic issues were considered, although in most of the cases there was a clear line between partnership and other contentious issues that required collective negotiation. By ring-fencing the latter enabled the partnership process to deal with a range of issues in a broadly positive business-like manner. Importantly, informal communications and the willingness of key 'champion' of the process of partnership served as a significant conduit in promoting the role and legalisation of union involvement in workplace partnership. One area that is left to consider is how these roles mediate relations between shop stewards and union members and those of the plant management, considered in the next section.

Partnership Roles and Relations of Shop Stewards

Despite the differences between the companies in terms of sector, occupational mix and range of issues, respondents reported a number of broadly comparable behaviours when describing their relationships with management and union workers.

Shop steward roles and relations with management

Shop stewards viewed their role in partnership as being part of a 'joint' problem-solving team that included themselves and managers. Together with partnership representatives, shop stewards remarked how they gained greater access to senior management and commented that managers appeared willing to listen to their concerns.

Also the relations between shop stewards and management were evidently improved owing to issues being dealt with in a timely manner. As might be expected in private sector firms operating in competitive market environments, management stressed the importance of speed of decision-making. For union stewards a corollary was that they were able to discuss issues and resolve (minor) concerns at a lower hierarchical level, and often without the need for protected stages of consultation in the formal partnership forums. Evidently, timeliness was very much interconnected to the extent of informal relationships between managers and union stewards.

Shop steward roles and relations with union members

On several major issues shop stewards were not consulted at all or there existed tension as to whether certain issues should be discussed in the partnership forum or resolved through traditional collective bargaining. This was the concern over pension rights in Manufacturing Firm B, which was identified as the main issue that led to the complete collapse of partnership in that company.

At times shop stewards were under pressure by workers to demonstrate that partnership worked. In some instances (Manufacturing Firms A and B, and Financial Services D), such pressures tended to materialise after a number of years of partnership, in which union members viewed partnership as little more than a 'talking shop'.

A further fracturing in the relations between union stewards and union members under partnership was evidenced when union representatives were restricted in the time they could take off to fulfil their duties. In most incidents, management provided shop stewards with time off to carry out union activities.

Perhaps the most dramatic weakening of union-member relations occurred when shop stewards appeared to police management policy. For example, in Manufacturing A, shop stewards agreed to 'caution' members about the amount of sick absence in the company. At the request of management, shop stewards informally talked to members and pointed out the possible consequences of excessive sick absence for the company. It was only in retrospect, remarked two shop stewards at Manufacturing Firm A, how this looked to members. Workers started to question the efficacy of the shop steward role within partnership as the line between union and management was becoming blurred.

Yet there were also signs of positive union-member relations as a result of wider and more transparent access to management and to information as a result of partnership. Examples include the ease shop stewards felt in raising concerns with management that were deemed important to members. These varied by case and by groups of union members with different issues.

Oxenbridge and Brown (2002, 2004) and Geary and Roche (2003) consider specifically the displayed activists thesis in terms of partnership incorporating union stewards into the higher echelons of management with a dissonance between union activists and member concerns. Across all case studies in this sample, union stewards seemed to have a reasonably solid relationship with members. At times a fracturing in this relationship occurred not necessarily because of partnership per se, but more because of the dynamics of labour-management relations more generally. Union stewards did not achieve massive gains for their members, yet they did consult and engage with members in a more interactive way because of partnership. In some instances the ability to demonstrate the union was independent of the company was considered more important than partnership, as in Manufacturing Firm B, when it was felt more advantageous for union members to withdraw from partnership and enter separate collective negotiations along with third party (e.g. Labour Relations Commission) mediation. In other situations, union stewards had to cope with competing demands from members while also facing pressure from supervisory management to maintain a full work complement. Yet they managed to share information with members and on many occasions seek their views prior to decisions being made with management.

DISCUSSION AND CONCLUSIONS

This paper has examined the role of workplace shop stewards in what can be described as robust partnership relationships. The selection of cases which were deemed to be robust was purposeful as this allowed for a critical examination of what are supposed to be 'good' or 'exemplar' partnership practices at the workplace level. The processes and partnership fora were subsequently examined in relations to the *scope*, *breadth* and *depth* of union involvement. This then enabled an assessment of the role of shop stewards with regards to management and specifically union members. Since the research on one of the cases, Manufacturing B, has abandoned partnership, primarily because partnership could not resolve a growing number of conflictual and distributive bargaining issues. In summary, workplace partnership is not a straightforward win-win concept in which all parties benefit from mutual gains and collaborative relations. Yet it is also found across these cases that there are some significant positive attributes of partnership that shop stewards favoured. Even acknowledging that partnership collapsed at Manufacturing Firm B, the evidence lends support to the view that enterprise level partnership is mediated by a series of factors, not least of which is the context of the organisation, the strength of unionisation and the existence of partnership 'champions' at a senior management and union level. Moreover, the debate about the processes of partnership and the way integrative problem-solving mechanisms are played-out on the ground is as important as the potential gains (advocates) and losses (critics) of partnership. From this a number of policy and theoretical implications can be noted.

First, literature by leading scholars (Guest and Peccei, 2001; Oxenbridge and Brown, 2002, 2004; Roche and Geary, 2002a, 2006; Kelly, 2004; Geary, 2008, Dobbins and Gunnigle, 2009) points to the centrality and interplay between structure and agency in determining how partnership processes are played out at workplace level. When comparing the cases presented in this study on the basis of structure, three firms could be easily described as robust (Manufacturing A and C, and Financial Services D), one shallow (Hospitality E), and one collapsed (Manufacturing B). Shop steward roles and relations within the more robust partnerships exhibit high level of unionisation, which stems from long-standing union recognition and near 100 percent membership (two of which still maintain a closed shop agreement: see Table 1). With regard to the *scope* and *breadth* of the partnership process, union stewards were able to voice their members' concerns on a wide range of issues, from minor, operational to more substantive employment conditions. Across the case studies, shop stewards experienced an increased level of information-sharing, two-way communication and consultation with management. The result was a generally favourable posture towards partnership that helped legitimise and consolidate union involvement.

However, with regard to the *depth* of participation through partnership, then the picture is much more complicated. The deeper partnership relationships had a distinctive informal dimension coupled with an openness to ring-fence conflictual issues as more appropriate to collective negotiation. In this way, partnership may have dealt with lower level matters, but it was able to operate effectively on a whole range of issues that were of concern to union members. Interestingly, the informal roles of shop stewards were more developed in the robust cases, which also helped to nurture collective bargaining as a parallel channel for resolving differences. Indeed, very little informal partnership was found in Manufacturing B; the only firm where partnership subsequently collapsed.

A second implication concerns the independence of shop stewards and their role with union members. This included exercising a representative capacity with the workforce through the mechanisms of union-management negotiations as separate from partnership, holding their own shop steward meetings and continuing to obtain time off to carry out union activities. The quality of the shop steward relationships with management was reflected, to a large extent, in their relations with unionised workers. In part, a degree of independence from management was necessary to strengthen union-member relations. This was most apparent in situations where shop stewards could clearly distinguish issues that were appropriate for collective negotiation, and issues that could be considered in a more cooperative environment of social partnership. This signals a more complicated and uneven dynamic to the processes underpinning workplace partnership. Evidence reported here found that workers would become frustrated at a lack of progress through partnership, or concern that partnership was being used by management to push through more substantive changes. Moreover, even when presented with positive union perceptions about partnership, the processes demonstrate that the employment relationship remains fraught with ambiguities and an undercurrent of antagonism. Thus the effects of partnership are more complicated and uneven than measurable gains or losses.

Finally, the longevity of partnership is likely to be tested further in the Republic of Ireland (and elsewhere) owing to a deepening economic recession. Over the last decade a growing reliance has been placed on national tripartite partnership agreements to map out economic adjustments. One consequence can be a diminution of the capacity of shop stewards to negotiate more substantive issues at workplace level given the dominance of softer consultation through partnership. In other words, enterprise-based structures may no longer be equipped to effectively respond to decentralised bargaining demands in depressed economic climate. Related to this is whether a fragile political regime can maintain partnership at a national level. In Ireland unions recently had to abandon national partnership talkover government-imposed tax increases and public sector pay cuts.

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