The partnership phenomenon in the UK

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The British partnership phenomenon

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The British partnership phenomenon

This article presents a detailed review of the vast partnership literature which has emerged over the last decade. It begins by examining definitions of partnership, and suggests that while academic definitions are unhelpfully vague, practitioner definitions tend to conflate partnership processes with partnership outcomes. An alternative definition based upon partnership processes and practices is offered. This is followed by a review of the conceptual advocates/critics debate, and the abundance of empirical partnership studies exploring trade union representative capacity/mutual gains outcomes. It is proposed that while recent empirical evidence identifies a variety of outcomes and presents various typologies of partnership, there is an absence of debates on typologies in the literature. The article then identifies several limitations of the existing literature including ideological positions, a lack of sensitivity to context and to different types of partnership, and a focus on outcomes. The article concludes by suggesting a need to understand more about the process of partnership, to clarify the meaning and expectations of partnership, and stresses the importance of evaluating partnership in context.
The British partnership phenomenon

“The concept of partnership has become the defining feature of the ‘new’ industrial relations settlement for the Millennium” (Stuart and Martinez-Lucio, 2004b, 410).

Introduction

In 1998 Ackers and Payne identified a new HRM trend, partnership, which promised to bring unions back into the heart of the employment relationship (Ackers and Payne, 1998). A decade later, the time has come to take stock of the vast partnership literature which has emerged. It begins by examining definitions of partnership. This is followed by a review of the conceptual advocates/critics debate, and the abundant empirical partnership studies exploring trade union representative capacity/mutual gains outcomes. The paper then highlights several limitations of the existing literature, and concludes by suggesting a need to understand more about the process of partnership, to clarify the meaning and expectations of partnership, and stresses the importance of evaluating partnership in context.

What is ‘partnership’?

“The term partnership has become too diffuse to carry much meaning” (Oxenbridge and Brown, 2004b, 389).

Since the early 1990s partnership has attracted an enormous amount of attention from the New Labour government (DTI, 1998), the Trade Union Congress (TUC, 1999), and most of the major trade unions including Unison, T&GWU, GMB, Amicus and USDAW. Partnership has also been endorsed by other bodies including Acas and The Work Foundation (Acas, 2003). While the partnership concept has also attracted a voluminous research literature, definitions of partnership remain a matter for debate.
(Ackers et al., 2004; Ackers and Payne, 1998; Dietz, 2004; Guest and Peccei, 2001; Stuart and Martinez-Lucio, 2004a). As a result of the “inherent ambiguity” (Bacon and Storey, 2000, 409), partnership has been described as “an idea with which almost anyone can agree, without having any clear idea what they are agreeing about” (Guest and Peccei, 2001, 207). In reality, however, the concept has attracted significant controversy and support is far from universal. Indeed an element of ambivalence has been evident within the union movement (e.g. RMT and ASLEF), employer bodies (e.g. CBI and IoD) and employers (e.g. anti-union campaigns) (Gall, 2004, IoD, 2002; Undy, 1999). In part this may reflect the lack of a common definition.

Academic definitions centre around the idea of “co-operation for mutual gain” and “reciprocity” (Martinez-Lucio and Stuart, 2002). For Gall (2004) the idea of ‘mutualism’ – where a successful employer is able to benefit all stakeholders involved – is a defining feature. Guest and Peccei (2001) also suggest that trust and mutuality are the key components of a genuine partnership agreement. Rhetorically at least, partnership appears to be hinged upon the proposition that, for employers, it can be both economically effective and ethically responsible to co-operate with unions and employees on issues of strategic organisational change (Stuart and Martinez-Lucio, 2004). For Terry (2003) commitment to business success, a quid pro quo between flexibility and employment security, and the representation of different interests are key. However, academic definitions are inevitably vague and a useful definition “should describe a set of organisational characteristics and practices that, firstly, do justice to the idea of managing employment relations in a ‘partnership’ manner and secondly, are
readily observable in order to verify a genuine example in practice” (Dietz, 2004, 4; see also Guest and Peccei, 2001). To this end, more practical definitions are offered by the TUC and IPA and these are outlined below.

While the IPA definition is open enough to allow for the possibility of partnership in non-union contexts, the TUC believe trade union presence is essential to partnership arguing that “in companies without unions…consultation always risks being a sham” (TUC, 2002, 5). They argue that this voice is essential to act as a counterbalance to the power of management (TUC, 2002). The two models also agree on the need to balance flexibility with employment security, although care has to be taken with the definition here; a ‘stable employment framework’ is meant rather than a ‘job-for-life’ guarantee” (IPA, 1997, 2). They also agree on the desirability of positive employee outcomes although these are defined slightly differently, with the IPA focusing on ‘sharing success’ with the financial connotations, whereas the TUC prefers the broader notion of ‘improving the quality of working life’ (TUC, 1999,13). However, both include outcomes as part of their definition of partnership, and it is proposed here that it is important not to conflate partnership processes with employment relations outcomes. Employment relations outcomes (such as employment security or adding value) are better thought of as aspirations which need to be explored empirically, but do not constitute an integral component of the partnership process per se. Partnership may concern an attempt to achieve these outcomes, irrespective of whether or not they are achieved.
It is suggested that a more useful definition would offer some suggestions regarding the identifiable practices and processes associated with partnership. In terms of practices, employee voice is central to all definitions and this may involve a mix of direct participation, representative participation and financial involvement. However, most policy and organisational definitions suggest it is representative participation which is the bedrock of partnership, with or without trade unions, and this is also implicit in most academic research. At the centre of the process of partnership are issues of decision making and actor relationships. Partnership decision making is typically described as a ‘joint problem solving approach’, characterised by a genuine process of early consultation and affording some influence over decision making but not necessarily joint decision making. Actor relationships are said to require trust and openness, mutual legitimacy and a commitment to business success, and as such the values and behaviour of organisational actors are crucial. Inevitably, there is likely to be some variety within this general framework, but it is proposed that these are the practices and processes which underpin a prima facie case of partnership and are likely to be mutually reinforcing.

**Ideological debates: nirvana or dead end?**

Most commentators acknowledge a polarised conceptual debate in the literature, regarding firstly the potential of partnership as a union revitalisation strategy, and secondly the extent to which the mutual gains are actually realisable (Martinez-Lucio and Stuart, 2004; Oxenbridge and Brown, 2004a, 2004b; Roche and Geary, 2004; Stuart and Martinez-Lucio, 2004b; Terry and Smith, 2003). For advocates partnership
may offer an opportunity for unions to extend their representative capacity. Ackers and Payne (1998, 531, 546) argue that partnership “offers British unions a strategy that is not only capable of moving with the times and accommodating new political developments, but also allowing them a hand in shaping their own destiny” and “provides an opportunity for British unions to return from political and economic exile”. It is certainly true that union elites appear to have been attracted by the potential of a new role in the regulation and of work (Stuart and Martinez-Lucio, 2004b).

Advocates are also attracted by the idea of ‘mutual gains’ bargaining over employment security, flexibility, development and involvement (Kochan and Osterman, 1994). It is suggested that employers may benefit from a new cadre of representatives, improved relations with unions, and assistance with the facilitation of change. In turn unions may benefit from increased influence, greater access to information, job security and inter-union co-operation (Marchington, 1998). Employees are also said to benefit from greater job security, training, quality jobs, good communication and more effective voice (Guest and Peccei, 2001; Kochan and Osterman, 1994; Knell, 1999).

On the other hand, critics question the coherence of the partnership model, and point to the risks of adopting such an approach (Claydon, 1998; Danford et.al, 2005a; Kelly, 1996; Taylor and Ramsey, 1998). Their primary concern is the extent to which partnership incorporates trade unions and may lead to compliant unions thus limiting the ability of unions to attract members (Kelly, 1996; Marks et.al, 1998; Taylor and Ramsey, 1998). It has been argued that some employers may view partnership as another union
‘Trojan horse’ and express a preference for free labour markets and individualisation of
the employment relationship (Claydon, 1998). Indeed, WERS04 revealed that 77%
managers agreed that they would rather deal with employees directly rather than
through trade unions (Kersely et.al, 2006). Managers may also be concerned that
partnership may slow down decision-making, incur extra costs, and challenge their
managerial prerogative. Others simply doubt the putative benefits of such an approach.
Critics argue that partnership may simply represent a pragmatic management decision
rather than evidence of a long-term commitment to working with unions, as managers
decide to ‘involve’ unions but only within strictly defined parameters, and very much
upon their own terms (Ackers et.al, 2004; Bacon, 2001). In other words, management
will always be pragmatic in attempts to identify ‘what works’ (Edwards, 2003).

The most vocal case against partnership has been expressed by Kelly who defines the
debate in terms of a choice between militancy and moderation (1996, 87). For Kelly,
union militancy is a preferable option in light of what he perceives to be the growing
hostility of employers to any form of unionism, the beneficial consequences of industrial
action, the meagre consequences of moderation, and the continuing antagonism of
interests between workers and employers. He concludes that “it is difficult, if not
impossible, to achieve a partnership with a party who would prefer that you didn’t’ exist,
the growth of employer hostility is a major objection to the case for moderation” (Kelly,
1996, 88). Critics also express fundamental concerns regarding the British business
environment and structure of corporate governance which focuses upon short-term
performance, arguably meaning there is less incentive to engage in long-term
partnerships (Ackers et al., 2004; Deakin et al., 2004; Heery, 2002; Suff and Williams, 2004) and the possibility the employer may renege on promises at any time, given the voluntarist framework of minimal juridification (see also Haynes and Allen, 2001). As Heery has stated, “The dominant characteristics of British business…do not furnish an environment in which union strategy of partnership can flourish” (Heery, 2002, 26). In short, the partnership debate is starkly polarised between the optimists and the pessimists, and these competing perspectives are summarised in Figure 2.

[FIGURE 2 ABOUT HERE]

Recent empirical evidence

The past decade has also seen a large quantity of empirical studies on partnership, mostly of which are qualitative case studies. Two main themes dominate the research: trade union representative capacity outcomes, and the delivery of mutual gains. To illustrate the vast literature partnership has attracted in the last decade, major studies are summarised in Figure 3, and are then explored in more depth.

[FIGURE 3 ABOUT HERE]

Theme 1: Trade union representative capacity outcomes

Perhaps because of the bleak prognosis of recent commentaries on the future of unions in the UK many of the partnership studies focus upon trade union representative capacity outcomes (Howell, 1999; Metcalf, 2004; Ross and Martin, 1999), (see for example, Badigannavar and Kelly, 2005; Geary and Roche, 2003; Haynes and Allen,
2001; Heaton et.al, 2000; Heery et.al, 2004; Martinez-Lucio and Stuart, 2002; McBride and Stirling, 2002; Roche and Geary, 2002; Samuel, 2005; Wills, 2004; Wray, 2004). In many respects this also illustrates the remarkable loyalty of the British IR community to the trade union movement.

In one of the earlier studies, Haynes and Allen (2001) explore partnership at Tesco and Legal General, and suggest that partnership not only led to the strengthening of workplace union organisation, but was actually founded upon strong unionisation. At Legal and General benefits were thought to include better training, jointly-management flexibility initiatives, a more open environment, and an increase in union members and activists. The Tesco case also experienced increased union membership, increased activism, and more effective consultative procedures in terms of issue resolution and quality of input (see also IRS, 15.08.1999; Samuel, 2001).

More recent studies in the financial service sector include Wills (2004) and Samuel (2005). Wills (2004) studied the Barclays-Unifi agreement, and found that partnership offered both benefits and risks for the union. On the one hand, the union had access to senior decision-makers in the organisation, greater employer support for the union, improved workplace representation, and more positive shop-floor management attitudes. On the other hand, tensions included difficulties in demonstrating union impact, and the risk of being perceived to be ‘bought-in’ to management decision-making, thus supporting both the positive (Ackers and Payne, 1998), and negative positions (Kelly, 1996; Taylor and Ramsey, 1998). Samuel (2005) investigated a
partnership agreement between Legal and General and Amicus-MSF. He argues that partnership actually improved union organisation and increased influence in management decision-making, especially at the workplace level. In particular, he found a new cadre of pro-active and competent union representatives were able to forge better relations with management. Though partnership was very much on management’s terms, ultimately, union membership had increased, employee satisfaction with the union was good, and there was evidence of the union providing an important ‘checks and balances’ role.

Research in the public sector by Badigannavar and Kelly (2004) investigated the implications of partnership for trade unions in the UK civil service, and their conclusions were much more pessimistic. They conclude that partnership did seem to offer improvements in employee influence, information, and training, but on the other hand, evidence on employment security and union influence was mixed, and they suggest that partnership appeared to be negatively related to grievances and union density. Their findings were said to “lend little support to the idea that in the current UK context partnership arrangements…are likely to contribute to union revival” (Badigannavar and Kelly, 2004, 22). Another public sector study in the NHS was also pessimistic (Tailby et.al, 2004), where partnership was said to offer limited discretion and to be a process very remote from most ordinary employees. The study argues that there was a “democratic deficit” primarily as a result of the performance regimes under which managers managed. Union decision-making was found to be centralised and distant
from members, and the effectiveness limited by the contradictory pressures of divergent targets, priorities and expectations (Tailby et al., 2004, 417).

Overall, the bulk of the ‘trade union implications’ has been critical. For some, partnership remains doomed and a militant unionism is a more appropriate option. This is illustrated by the comments of Danford et al. (2004), who argue that, “Partnership does not negate Kelly’s militant unionism, it demands it...high performance work systems and partnership do not resolve the structural antagonism between capital and labour” (Danford et al., 2004, 186). This view echoes Taylor and Ramsey (1998, 141) who argue that “for unions...an ‘oppositional stance’ to management remains justified and relevant”. Similarly, for Hyman the focus should be on partnership between trade unionists and not been management and unions. As he states, “Trade unions should indeed embrace the principle of partnership. But its basis should be with other workers and trade unionists: nationally and internationally” (Hyman, 2004, 407). However, it is proposed that it is not necessarily the ‘resolution’ of antagonisms between capital and labour which is the main issue, but rather the moderation of a dynamic employment relationship characterised by periods of both conflict and co-operation.

Conversely, others argue that militancy is simply untenable in the current environment, with Ackers et al concluding that “Partnership with employees is going ahead with or without trade unions (Ackers et al., 2004, 64), leaving unions with a choice of ‘partnership or perish’. A similar conclusion is reached by Oxenbridge and Brown who believe that there are simply limited alternatives to partnership suggesting that, “for
unionised employment in Britain as a whole, the future will lie in greater cooperation. The economic and legal environment in prospect leaves little option” (Oxenbridge and Brown, 2004c, 157).

**Theme 2: Mutual gain outcomes**

A second stream of literature focuses on the extent to which partnership can be argued to deliver ‘mutual gains’ to the various actors. Many studies have evaluated whether partnership delivers mutual or uneven benefits to employers, unions and employees (See Badigannvar and Kelly, 2005; Danford et.al 2004; 2005; Johnstone et.al, 2004; Kelly, 2004; Kelly, 2004b; Oxenbridge and Brown, 2004b; Richardson et.al 2004; 2005; Suff and Williams, 2004). Much of the interest in this particular issue appears to relate to a seminal article by Guest and Peccei (2001) on the ‘balance of advantage’. Guest and Peccei (2001), although in favour of partnership overall, concluded that there appeared to be unbalanced outcomes towards management. Indeed, they stress that this is not an argument against partnership per se, as they believe that a strong high trust partnership could potentially deliver superior outcomes for employers, unions and employees. The key point the authors make, however, is the need to take an integrated approach, and that in practice a lack of trust between parties was often a barrier to building effective partnership relationships. However, they argue that in principle a high-trust partnership with extensive employee representation and direct participation should create benefits which flow to all stakeholders. They warn that a pick-and-mix approach is inherently risky and may simply become a disappointing ‘hollow promise’ (233) (see also Kochan and Osterman, 1994; Roche and Geary, 2002).
However, Kelly (2004a) suggests that partnership firms perform no better than their non-partnership counterparts. His research focused on the labour outcomes in partnership and non-partnership organisations, through the examination of issues including employment records and job losses, profits, wages, and hours of work and holidays, and union density. He concludes that there was no impact on wage settlements, working time, holidays or union density. In terms of employment, in expanding industries partnership firms created more jobs than in non-partnership firms, but in declining industries partnership firms shed more jobs than non-partnership firms. However, it remains very difficult to quantitatively ‘measure’ the outcomes of partnership accurately.

In the public sector, Badigannavar and Kelly (2004) have also investigated the outcomes of arrangements for workers, unions and employers by comparing matched comparisons of partnership and non-partnership organisations in the NHS and civil service. They draw three main conclusions. Firstly, that in only a few cases were employee outcome variables superior to their non-partnership counterparts. Secondly, there were significant differences in outcomes between the health service and the civil service, and in particular the finding that there was no difference in the employee outcomes between the two NHS trusts. In the civil service they actually identified superior outcomes in the non-partnership organisation. They argue that this could be because the NHS agreement was heavily ‘employer dominant’, whereas the union in the civil service partnership organisation had never been as well organised or achieved
such high density as its non-partnership rival. Overall, they conclude that there is little evidence to support the mutual gains assertions in terms of union influence or better voice for workers. Another study in the non-union retail sector by the same authors also concludes that the partnership is “precarious and well as ineffective” (Badigannavar and Kelly, 2005).

In aerospace and public sector, Richardson et.al (2004) suggest that work intensification, stress and job insecurity may actually be the reality for employees in partnership environments, and conclude that “the assumption that partnership leads unambiguously to mutual gains is highly questionable” (Richardson et.al, 2004, 353). Similarly, Wray (2004, 209) concludes that “in many instances, far from a situation of ‘mutual gains’, only marginal gains have been won for workers compared to significant gains for management”. He argues that this case organisation was characterised by a labour process based on exploitation and control rather than a collaborative relationship between capital and labour.

Less pessimistically, Suff and Williams (2004) found mixed results in their case study of Borg Warner where management and union representatives generally argued that partnership had been a success. Employees also cited benefits including better participation in organisational decision making. On the other hand, employees did not really believe they had significant influence over decisions. Most employees also still felt insecure, and indeed thankful that they still had a job. However, with regard to rationale they found that, “the partnership concept is better viewed as a management device to
secure enhanced organisational performance than an attempt to build genuine mutuality” (Suff and Williams, 2004, 4).

In sum, it seems fair to suggest that the partnership vogue has resulted in a fierce debate between critics and advocates. There are also those who support partnership in principle but – in response to empirical evidence – express doubts regarding the extent to which benefits have been achieved to date, and are conscious that barriers have to be overcome (Bacon and Storey, 2000; Guest and Peccei, 1998; Oxenbridge and Brown, 2004a, 2004b). It may seem fair to conclude that “the empirical evidence suggests that partnership in the UK is uneven, fragile, with little evidence of increased employee voice or mutual gains” (Stuart and Martinez-Lucio, 2004b, 412).

**Typologies of partnership**

Recent accounts, however, reveal that the outcomes are less black-and-white than the polarised debate implies. There is increasing acknowledgement in the literature that earlier debates were fatalistic (Samuel, 2005), and that partnership may not hold any single consequence, and depends upon various conditions such as the underlying management and union strategies, rationale for partnership, and the way in which it has been implemented (Heery, 2002; Heery et.al, 2004; Roche and Geary 2003; Samuel, 2005; Wills, 2004). Given that partnership has been subject to various uses and interventions, and for different reasons, it is perhaps unsurprising that different outcomes appear to have emerged in the literature (Stuart and Martinez-Lucio, 2004b). After all, “partnership is an imprecise term in employment relation, the meaning on which wanders from user to user and context to context” (Heery et.al 2004, 274). From
the literature various distinctions can be drawn including formal v informal, union v non-union, private v public sector, and the route to partnership. This had led to typologies of partnerships emerging in the literature (Kelly, 2004a, 2004b).

Wray (2004) draws a distinction between ‘genuine’ and ‘counterfeit’ agreements in his study of a light engineering company in the north of England. He argues that a genuine partnership depends upon how much voice partnership provides to employees, how far the relationship provides mutual gains, and how and for whose benefit the structures of partnership are operationalised. However, he suggests that the case in his study is best regarded as counterfeit. This was thought to be partly a result of the route to partnership which was characterised by the possibility of enforced recognition under the Employment Relations Act (1999), and a union signing the agreement primarily to increase membership. However, despite his critical stance, Wray (2004) does suggest the possibility that genuine partnerships may exist.

Kelly (2004a) makes a distinction between ‘employer dominant agreements’ and ‘labour parity agreements’. He argues that given that most agreements have been signed within a context of restructuring or poor industrial relations, they are thus more likely to have taken the form of weak employer-dominant partnerships, for example agreements in utilities following privatisation, banking following deregulation, and motor manufacturing following intense Japanese competition. Labour parity agreements, he argues, are more likely where there are strong power resources such as with BA pilots and the Royal Mail. In reality, however, it is difficult to believe that such agreements are achievable in
most private sector environments; indeed it is difficult to visualise what a true private sector ‘labour parity’ arrangement would look like.

Oxenbridge and Brown (2002) identify a distinction between ‘containing’ and ‘nurturing’ arrangements, which they refer to as the ‘two faces of partnership’. They suggest that in the service sector containing agreements were more typical, where employers tried to contain the union by restricting their rights, whereas in manufacturing nurturing was more common, characterised by negotiating rights over pay and conditions, high union density, and active workplace representatives. Later work by the same authors examines the life expectancy of partnerships, and identifies ‘robust’ and ‘shallow’ agreements. Robust relationships were identified as conferring a range of benefits to both parties, and were found in organisations where the employer supported trade union recruitment, wide scope of recognition, a history of trade unionism, high union density and extensive union input into decision making. The primary benefits were from the informal consultative processes and the higher levels of trust. Shallow arrangements provided much fewer benefits for the union and were much less embedded. In the cases managers typically restricted union recruitment activity, and allowed unions on limited involvement in workplace affairs. They conclude that while robust cases with employer support for the union and high membership appeared to be sustainable, the same could not be said for shallow case characterised by a lack of employer support and employee apathy. Accordingly, they propose that partnership is more likely to be sustainable in large scale manufacturing and the public sector, where a tradition of trade unionism is already deep rooted (Oxenbridge and Brown, 2004).
Deakin et.al (2004, 115) suggest that partnerships can be either be ‘mature and enduring’ or ‘weak and disintegrating’. The former are characterised by union promotion of a high trust culture, and management keeping their side of the bargain and investing in human capital. The latter scenario, however, involves a union role limited to that of dealing with the consequences of redundancy, with management offering a minimal commitment to employment security. They suggest that while a mature and enduring partnership is likely to survive an external shock, in weak partnerships actors are more interested in taking measures to minimise their exposure in the event of corporate failure, as opposed to genuinely engaging in a strategy aiming for mutual gains cooperation. Samuel (2001) also draws a distinction between ‘defensive’ partnerships arising out of a crisis, and ‘offensive’ partnerships reflecting a more evolutionary approach to improving employment relations. The former are more likely to focus on issues such as redundancy management, whereas the latter may be looking at improving performance or skills. Finally, Martinez-Lucio and Stuart (2005, 809) identify what they refer to as nurturing, transitional and coerced partnerships. Nurturing partnerships are predicated on an evolution of positive industrial relations (see also Oxenbridge and Brown, 2002; 2004a, 2004b). These are short-term, objective focussed, and are often the result of an exogenous shock, in other words what they describe as a ‘marriage of convenience’. They also identify coerced partnerships which they refer to as akin to shotgun weddings. These are elite level management driven partnerships, devised by management to manage change and often exhibit union compliance. Both
coerced and transitional partnerships appear to be incompatible with high trust enduring partnerships.

[FIGURE 4 ABOUT HERE]

In sum, as Roche and Geary (2004) remind us, there appear to be specific conditions under which a robust partnership is likely to emerge. This reflects the arguments of Kochan and Osterman (1994) that partnership must be sufficiently institutionalised if it is to be enhancing or effective, and suggests that there is a need to understand the different types of partnership that are possible and to avoid asserting that partnership necessarily leads to a specific outcome (Haynes and Allen, 2001; Samuels, 2005; Wills, 2004). This suggests a need to understand more about what facilitates positive and negative consequences, and in particular the contexts and preconditions associated with each.

Limitations of the existing literature

It has been suggested that the literature is characterised by a starkly polarised debate between advocates and critics. However, as Martinez-Lucio and Stuart state:

“Accounts of partnership as a panacea for the future of employment relations are too simplistic, but so too are those that crudely conceptualise partnership as the latest management weapon for incorporating trade unions” (Martinez-Lucio and Stuart, 2004, 421).

Moreover, as if to exacerbate the confusion, the recent literature identifies a variety of possible outcomes, suggesting a much more complex picture than the ideological
advocates/critics stalemate. Accordingly, it is proposed that there are ideological,
contextual, methodological limitations to the current research. In addition, the research
fails to recognise the varieties of partnership relationship, and tends to focus on crude
measures of outcomes. These are now discussed in turn.

Ideology
Firstly, there is a strong ideological dimension to partnership (McBride and Stirling,
2002). Views on partnership are inextricably linked to industrial relations frames of
reference (Fox, 1974), and as such partnership is much more likely to be acceptable to
those holding a unitarist or pluralist viewpoint. The fact that we have a “highly polarised
political debate” (Kelly, 2004b, 305), in the UK is therefore not surprising, as it is difficult
to separate views on partnership from the ideological beliefs and political colours of
researchers. For some, the institutional framework – without sectoral or industrial
bargaining, and combined with short-termist corporate governance – inevitably leaves
little scope for partnership (Waddington, 2003). In addition, even although critics report
some positive findings in their studies, these are typically overlooked in the conclusions
of the overtly critical commentators. It also reflects the ideological constitution of British
IR as an academic field, with a strong Marxist tradition centred on the study of trade
unions, with many of the pessimistic studies written from a critical IR tradition, which is
now purely pessimistic following the ‘death of socialism’. On the other hand, the views
of IR pluralists are more divided and uncertain.
Context

There is a lack also a lack of sensitivity to context. However, analysis of partnership should examine the context of the agreement as well as the relationships surrounding the negotiations (McBride and Stirling, 2002). As Marchington et.al (1994, 890) argue in their studies of EI, it is important to contextualise actor attitudes within the competitive and strategic environment in which businesses operate. They argue that there is a need to ‘ground’ studies of employee involvement in context, and the same is true for studies of partnership. For example if only bad news is being delivered through the partnership infrastructure this could very possibly lead to negative attitudes towards partnership itself. Conversely, positive attitudes towards partnership could be symptomatic, perhaps, of a feel good factor within the organisation because of recent good news such as a large pay rise. Workers’ prior experiences of participation and in general, management’s approach to employment relations and the recent and future performance of the organisation are all likely to be important (Marchington et.al, 1992, 1994). This leads to difficulties interpreting and comparing evaluations derived from both buoyant sectors and those in decline (Johnstone et.al, 2004). Studies examine partnership in different sectors with very different product and labour market conditions, as well as different traditions of industrial relations. There is the possibility that partnership is likely to be successful in older industry sectors, with a history of unionisation, and buoyant sectors (Kelly, 2004a; Heery, 2002; Oxenbridge and Brown, 2004b). In particular, a clear distinction must be made between partnership in the public sector, where union density is often high, combined with strong state protection and insulation from market forces, compared to the private sector, where union density
is often low, a tradition of unionism may be less entrenched, and market competition may be high.

Methodology

There are also several methodological issues. In particular, there is lack of data regarding worker responses to partnership. As Ackers et al. (2004) state, “The attitudes and experiences of ordinary employees are central to deciding how successful a system of partnership or participation is”, given that managers and trade union criterion for ‘effective’ voice are likely to be quite different from those of ‘ordinary workers’ (Ackers et al., 2004, 56). Surprisingly, there has been a lack of emphasis on employee responses to partnership (notable exceptions include Richardson et al., 2004). As Suff and Williams note, “direct evidence on the implications of partnership for workers in remarkably scarce” (Suff and Williams, 2004, 33). Rather, interviewees are typically trade union officials and managers, and few partnership studies have really engaged with debates on what workers want (see for example Bryson and Freeman, 2006). In many ways this reflects the tendency of industrial relations research to conflate the institutional interests of trade unions with the interests of employees, based on an assumption that what is good for the union must also be good for workers, and in turn failing to allow employee attitudes to be a shaping factor in the success or failure of partnership.

There is also a lack of comparative case study research. Kelly (2004a, 289) notes this lack of comparative case studies in the British literature, and suggests these may also
be useful in the British context to complement the existing single-case based research. Indeed, it is likely that comparative cases could assist with the process of ‘theoretical generalisation’ from the cases (Yin, 2003). Admittedly, the conduct of comparative case studies is not helped by the fact that it is difficult to identify a credible prima facie instance of partnership, given that partnership is such a vague and poorly defined concept it is perhaps unsurprising that the evidence presents mixed findings. This leads to the situation whereby Kelly (2004a) identifies Abbey National as a non-partnership organisation, whereas the IPA (2004, 1) describe the same organisation as having “a formal partnership agreement which has been in place for a number of years and which was updated in July 2003”. Clearly, researchers need to question whether – and justify why – they believe the case investigated constitutes a prima facie instance of partnership, for example in relation to the partnership criteria.

More generally, Kelly has criticised the lack of methodological rigour in some of the case study research commenting how, “The level of methodological rigour in the empirical research is sometimes poor. There are numerous widely cited case studies of partnership firms that are often uncritical and journalistic in tone, excessively reliant on the views of a few partisan informants, and seriously under-theorised” (Kelly, 2004a, 270). While an important point, clearly the need for methodologically rigorous research applies equally to the conduct of quantitative partnership studies as well, for it is not only case study research that is problematic. The TUC (2002) for example claim that evidence from WERS98 suggests that partnership organisations make fewer people redundant, have shorter average working hours and rarely declare compulsory
redundancies. This is a somewhat dubious analysis given that WERS98 does not distinguish between partnership and non-partnership organisations, or indeed make any reference to partnership whatsoever. Moreover, much of the literature is limited to snapshot case studies at a particular point in time. Clearly, this is not ideal given that partnership is a dynamic process evolving over time, and like any relationship takes time to evolve.

*Varieties of partnership*

A related issue concerns sensitivity to different types of partnership agreement. As the introductory section made clear, “Partnership is a loose word for many shades of the employment relationship” (Ackers et.al, 2004, 17), and distinctions can be made in terms of several variables. For example, there has been a focus on formalised agreements (with the exception of Oxenbridge and Brown, 2004), although some research has begun to make a distinction between ‘de jure’ and ‘de facto’ partnerships (Ackers et.al, 2004). Oxenbridge and Brown (2004b) identify three broad categories of relationship in terms of formality: formal partnerships with explicit agreements; informal partnerships where the term is widely used, and cooperative relationships which may not actually be described by the parties as partnership. There is also the issue of the different routes to – and rationale for – partnership. In other words, was the desire to build a strong partnership to assist with the management of change, to sponsor weak unions, or to bypass unions? (see for example Ackers et.al, 2004; also Martinez-Lucio and Stuart, 2005).
There has also been a focus on partnerships between unions and management. However, as Ackers et.al (2004, 56) argue, “it seems sociologically unproductive to rule out non-union consultative forms, whether voluntary or state regulated…before examining the evidence”. A similar point has been made by Stuart and Martinez-Lucio who argue that “much more research is needed to draw out the extent, characteristics and form of…non-union partnerships” (Stuart and Martinez-Lucio, 2004b, 418). The same bias is evident in wider discussions of voice which have also tended to be union centred. Non union workplaces are crudely assumed to have no HRM and no IR, and often non-union voice is dismissed as inferior to union voice without reference to empirical evidence (Haynes, 2005). Again, where non-union voice structures do exist they are assumed to be merely cosmetic devices lacking the necessary power and authority to be effective (Terry, 1999), even although evidence on the efficacy of representation in non-union settings is mixed (Bryson, 2004; Dundon and Rollinson, 2004; Gollan 2001, 2005, 2007). In addition, while radicals may view voice as a means to and end, pluralists tend to perceive intrinsic value in the process of voice itself. This relates to the greatest limitation of the partnership literature: the focus on outcomes.

**Focus on outcomes**

The tendency to focus on outcomes is odd given that partnership outcomes are notoriously difficult to quantify (Roper, 2000), and because partnership is about much more than just outcomes. As Stuart and Martinez-Lucio make clear:
“Partnership is not just about outcomes, or its potential for trade unions…partnership is a development that represents the emergence of a new approach to employment relations that attempts to reconfigure the form and content of management-union relations…it raises broader questions about the regulation of employment relations…partnership must be viewed [as] an attempt to reconfigure the form of employment relations and not just its outcomes” (Stuart and Martinez-Lucio, 2004, 11).

In other words, partnership can be viewed more broadly as an attempt to reconfigure employment relations in light of the demise of old style joint regulation (Terry, 2003). The narrow focus on outcomes is also criticised by Dietz, who suggests that it not just the outcome which is important but also more subtle issues such as the way issues have been handled. For example in relation to job losses:

“One need not express surprise when large scale redundancies take place under partnership. This issue is how they are agreed upon and handled. Training to enhance staff employability also plays a part” (Dietz, 2004, 9)

Partnership is also about subtle changes in attitudes and behaviours, which may not always be apparent if a narrow outcome focus is taken, requiring more attention to “internal behaviour transformations and attitudinal improvements” (Dietz, 2004, 7; c.f. Walton and McKersie, 1965). Such factors would inevitably be missed by studies such as Kelly (2004a) where selected labour outcomes are used to ‘measure’ the success of partnership. A similar sentiment is expressed by Wray who explains how in his research, “It quickly became clear that a full assessment of the outcome would be
impossible without a comprehensive understanding of the nuances shaping the process of negotiation” (Wray, 2004, 193).

It is not only the focus on outcomes which gives cause for concern, but also the way the outcomes of partnership have been evaluated and judged. In particular there is a lack of agreement regarding what partnership is actually expected to achieve, especially if the measurements for success are set unrealistically high. This has led to a situation whereby: “The expectations (both in terms of hopes and fears) generate by the term [partnership] means that it has become all too easy to set it up as a straw debate with aim of knocking it down” (Stuart and Martinez-Lucio, 2004b, 22). Consequently, outcomes are too easily offset against unrealistic announcements and agreements (e.g. increasing transparency, enhancing training and development, creating a better quality of working life), or other equally ambitious aims such as the renaissance of the union movement, exceeding the expectations of even optimists like Ackers and Payne (1998). Much depends on how ‘successful’ partnership is defined and what it is expected to achieve, but it seems unrealistic that long-term partnerships will lead to harmonious, consensual and conflict-free IR (Terry and Smith, 2003). After all, the employment relationship consists of a blend of shared and contrary interests which inevitably lead to periods of both co-operation and conflict (Bacon, 2001). It also seems unrealistic to even suggest that partnership will lead to ‘mutual gains’ in the purest sense of the term, with gains flowing equally and harmoniously to all parties; indeed it is difficult to imagine what such a situation would look like.
Most commentators do seem to agree, however, that it essential to examine \textit{process} in addition to outcomes if a more holistic understanding is to be achieved, as the following array of quotes illustrate:

“Good processes matter more than good institutions” (Guest and Peccei, 1998, 9).

“Although there exists a wealth of published material governing the breadth and depth of participatory practices in UK workplaces, we have much less understanding of participation as a process” (Danford et.al, 2005, 613).

“The study of partnership requires an approach that is sensitive to internal processes of decision-making, and the rationales that underpin the elaboration of strategies regarding work” (Martinez-Lucio and Stuart, 2004, 421).

“Need to understand more about the substance of the relationships forged as a measure of robustness as opposed to the formality of the agreement” (Oxenbridge and Brown, 2004c, 143).

Curiously, despite acknowledgement that process is important, and that without it only a partial view of partnership can be achieved, few existing studies have explicitly focused on understanding the process as well as the outcomes, in order to achieve a more holistic understanding.
Conclusions

There are three main implications from this paper. Firstly, it is important to examine partnership in context. Given that it is possible that an organisation could achieve positive ER and business outcomes without partnership and vice versa, a lack of contextual understand could hinder a full understanding of partnership. Indeed, it is difficult to isolate ER/partnership outcomes from broader contextual issues such as corporate strategy and labour market conditions. In addition to a greater awareness of individual organisational contexts, there is also a need to locate partnership studies within the British IR context of union decline and less jointly regulated employment relations.

Secondly, despite the agreement that process is important, much of the partnership debate has focussed on hard-to-measure outcomes rather than on understanding process (Terry and Smith, 2003). It is proposed that two particular aspects of process are likely to be instructive. There is a need to be more sensitive to the mechanisms of voice, and to the ways in which partnership mechanisms influence behaviour and outcomes, for example in terms of decision making processes. As Dietz states:

“The litmus test for all partnerships – unionised or not – is the quality of the joint problem solving processes…giving significant influence to employees over organisational decision-making early in the process, and in delivering regular, acceptable mutual gains for all parties” (Dietz et.al, 2005, 302).

Sensitivity must also be paid to the presence or absence of partnership ‘behaviours’ in the employer-union relationship, such as the level of trust between actors and the way
they interact and this is really what is distinctive about partnership. Oxenbridge and Brown (2004d) suggest that a high trust relationship is likely to be characterised by a central and legitimised role for workplace representatives, trade union involvement at the earliest stage of management decision-making, explicit or implicit acknowledgement that each party benefits from the relationship, openness in dealings between the parties, and commitment to the relationship from managers at all levels of the organisation (Oxenbridge and Brown, 2004d, 156). It is important therefore to “look beyond the superficial terminology to the relationships that underlie it…the intentions that lie behind them” (Oxenbridge and Brown, 2004d, 157).

Thirdly, there is a need to clarify the meaning and expectations of partnership before any attempt can be made to judge the outcomes. Definitions such as ‘mutuality’, ‘reciprocity’ are simply too vague. While they suggest a relationship between two parties, and the notion of an exchange where each party gains something, this reveals very little about the quality of the employment relationship; indeed even a Dickensian sweatshop could be described in such terms. ‘Co-operative employment relations’ is also ambiguous, as a co-operative relationship to one person could be perceived as co-option by another (Dietz, 2004). As a result, “it has become all too easy to set [partnership] up as a straw debate with the aim of knocking it down” (Stuart and Martinez-Lucio, 2004, 422). A more useful definition would include identifiable practices (such as employee and especially representative participation) with specific processes, such as early consultation and a ‘joint problem solving approach’ to decision making. Relationships based on trust, mutual legitimacy and commitment to business success
are also central. It is also important to draw an analytical distinction between partnership (defined as a combination of practices and processes), and employment relations outcomes which ought to be considered separately. For reformists, what really matters is the extent to which partnership delivers dome benefits to employees, as well as wider benefits to the economy and society as a whole. There is a need to reconsider the benchmarks for success, and to pay more attention to the expectations and perceptions of the actors themselves, and not just those of armchair theorists.

In conclusion, after a decade of research, considerable scope for further studies into partnership remains. In terms of methodology, the bulk of the case study research offers only a snapshot of partnership at a particular point in time in the organisations studied. However, it would be interesting to observe a partnership relationship over time, and longitudinal research could trace shifts in the partnership process and actor experiences over time. Further contributions could also be made by exploring the different experiences of partnership in various sectoral contexts. Such studies would comparisons to be made between organisations operating within similar constraints such as product and labour market conditions. Comparative case study research could also complement the surveys and single case studies which characterise the British partnership literature. A useful framework, perhaps, would be to explore prima facie union and non-union partnerships with employment relations in union and non-union organisations without partnership. In terms of future research foci, there is a need to redefine the debate by evaluating the experiences of other stakeholders other than trade unions, and to go beyond the questionable emphasis on trade union renewal.
Studies could aim to understand more about contemporary worker views and avoid relying on trade unionists as proxies of employee views, as well as management views and the perceived impact in terms of organisational performance. There is also the need to explore the disparate typologies and models which have emerged to advance understanding. Lastly, as the majority of British workplaces no longer recognise trade unions, and new pluralism is characterised by a mix of union and non-union bodies, formal and informal structures, and a range of consultation, negotiation and bargaining arrangements. More research is therefore needed into the characteristics and efficacy of non-union partnership arrangements.
References


**Figure 1:**
Defining partnership: the TUC and IPA

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<th>TUC</th>
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<td>Y</td>
<td>Values (Marchington, 1998) Commitment (IPA, 1997)</td>
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<td>Mutual recognition of the legitimate role and interests of management, employees and</td>
<td>Y</td>
<td>Y</td>
<td>Values (Marchington, 1998) Commitment (IPA, 1997)</td>
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<td>trade unions where present</td>
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<td>Commitment and effort to develop and sustain trust between the organisation’s</td>
<td>Y</td>
<td>Implicit</td>
<td>Values (Marchington, 1998) Commitment (IPA, 1997)</td>
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<td>constituencies</td>
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<td>Means for sharing information</td>
<td>Y</td>
<td>Y</td>
<td>Process</td>
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<td>[IPA]/Transparency [TUC]</td>
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<tr>
<td>Consultation and employee involvement, with representative arrangements for an</td>
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<td>Y</td>
<td>Process</td>
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<td>‘independent employee voice’ [IPA]/Transparency [TUC]</td>
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**Figure 2:**
Partnership: polarised perspectives

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<td>• Organisational success, competitiveness, productivity</td>
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<td>• Employee involvement, quality of working life</td>
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<td>• Win-win</td>
<td>• Co-option</td>
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<td>• Greater job security</td>
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<td>• Better working conditions</td>
<td>• Zero-sum</td>
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<td>• Higher productivity</td>
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Kelly (1996; 2000); Claydon (1998); Gall (2003)
## Figure 3:
Empirical partnership studies 1998-2007

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Figure 4
Summary of typologies of partnership

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<tr>
<td>Labour-parity</td>
<td>Employer-dominant</td>
</tr>
<tr>
<td>Mature and enduring</td>
<td>Weak and disintegrating</td>
</tr>
<tr>
<td>Offensive</td>
<td>Defensive</td>
</tr>
<tr>
<td>Nurturing</td>
<td>Transitional</td>
</tr>
<tr>
<td>Nurturing</td>
<td>Coerced/ Transitional</td>
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</table>

Figure 5
Sensitivity to different forms of partnership arrangement

<table>
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<th>Partnership arrangements</th>
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</thead>
<tbody>
<tr>
<td>De facto</td>
<td>De jure</td>
</tr>
<tr>
<td>Informal</td>
<td>Formal</td>
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<tr>
<td>Union</td>
<td>Non-union</td>
</tr>
<tr>
<td>Buoyant markets</td>
<td>Struggling markets</td>
</tr>
<tr>
<td>Crisis</td>
<td>Natural evolution</td>
</tr>
<tr>
<td>Public sector</td>
<td>Private sector</td>
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</tbody>
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