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ORIGINAL ARTICLE

# The unlikely success of coordinated bargaining in a liberal market economy: The case of Ireland

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**Abstract**

This paper challenges the prevailing view of the negative impact of collective bargaining decentralisation on trade unions in liberal market economies. It uses quantitative and in-depth company cases from four major sectors in Ireland, to explain how unions have effectively established bargaining coordination following the global financial crisis.

## 1 | INTRODUCTION

The decentralisation of collective bargaining is one of the most pronounced trends across Europe following the global financial crisis (GFC) (Trif & Paolucci, 2019). In the main, comparative research has reported the adverse implications that decentralisation holds for trade unions[1] and their ability to negotiate collective agreements (Tros, 2023). These are seen as particularly evident in liberal market economies (LMEs) such as Ireland (Rönnmar et al., 2023). This paper challenges the prevailing perspective and instead offers original insights into the positive manner in which unions can manage the decentralisation of collective bargaining, precisely in contexts like Ireland, where the institutional features of a LME appear to provide little support for the effective coordination of collective bargaining (Refslund & Arnholtz, 2022).

[1]Thereafter unions.

The paper reveals – what the literature would view as – the 'unlikely' success of Irish unions in coordinating company-level collective bargaining following the GFC.

Advancing earlier mainly quantitative work (Roche & Gormley, 2017), the paper demonstrates how unions have developed a range of formal and informal mechanisms to achieve both the vertical and horizontal coordination of company-level pay bargaining. In the following section we review the international literature on decentralised pay bargaining post-GFC. This frames our research questions. Subsequent sections outline our research methods, present our findings on economy-wide pay bargaining data and from in-depth case studies of four companies across four key sectors. The paper concludes by discussing the results and considering the foundations of coordinated bargaining within Ireland's LME.

## 2 | BARGAINING DECENTRALISATION AND ITS EFFECTS AFTER THE GFC

Significant transformations have occurred over the past decade in two pivotal facets of industrial relations across the majority of EU countries, irrespective of their classification as liberal, coordinated, or state-regulated markets. These key facets encompass the level at which collective bargaining is conducted and the degree of coordination of collective bargaining (Thelen, 2014)

Concerning the level at which collective bargaining is conducted, the most profound changes were observed in countries more heavily impacted by the GFC, notably Ireland, Cyprus, Greece, Portugal and Romania. Here, company-level negotiations became prominent. Some scholars termed these changes a 'frontal assault on coordinated bargaining in Europe's periphery' (Marginson, 2015) and linked them to instances of 'disorganised decentralisation' (Hickland & Dundon, 2016a, 2016b; Koukiadaki et al., 2016a, 2016b, pp. 197–198). Tros (2023, p. 17) specifically characterises Ireland's decentralisation as a 'breakdown,' attributing it to Ireland's 'highly fragmented' and 'highly workplace-centred' employment relations and 'pluriform industrial relations model' (Tros, 2023, pp. 31–4). Rönnmar et al. (2023, p. 235), albeit with some qualifications, also label Ireland as an instance of 'disorganised decentralisation' with 'lower degrees of coordination.' In contrast, other commentators argued that the decentralisation of collective bargaining in Ireland was 'orderly' rather than 'disorganised' and facilitated coordinated company-level bargaining (Roche & Gormley, 2017)

Similarly, countries Italy, Spain, Portugal Greece and Romania were seen to have experienced significant change marked by the 'erosion of their national and/or sectoral institutions' due to drastic state-imposed interventions (Marginson, 2015). Only few countries were seen to have experienced minimal transformation, with the national level (Belgium and Austria), sectoral level (Nordic countries) and company level (UK) remaining the primary arena for collective bargaining (Eurofound, 2015). In yet other EU countries, such as Germany, changes in collective bargaining structures occurred at a slower yet consistent pace, involving relaxing the procedural norms governing the relationship between bargaining levels that in turn resulted in the narrowing scope and coverage of sectoral bargaining (Muller et al., 2019)

Regarding the second facet of collective bargaining, namely, bargaining coordination. scholars often contend that bargaining decentralisation shifts the 'centre of gravity in collective bargaining towards lower levels and tends to diminish the coordination capabilities of unions and employers' organisations (Marginson, 2015, p. 99). Consequently, it becomes challenging for them to guide their members towards a specific course of action, such as negotiating specific increases in pay or working conditions. This effect is seen to be especially pronounced in LMEs (Crouch, 1993; Marginson & Traxler, 2005). In Traxler's (2004) terms, single-employer bargaining systems lack mechanisms able to secure stable and effective *vertical* and *horizontal* coordination. Horizontal coordination refers to the structures that facilitate coordination of bargaining across various units operating at the same level; whereas vertical coordination refers to the ability of higher level bargaining units, or organisations (i.e., national, sectoral, regional), to gain acceptance for rules or guidelines on the areas (i.e., wage increases or improvements in working conditions) addressed by lower-level bargaining (Brandl & Braakmann, 2021). In these ways single-employer bargaining systems are considered likely to be of limited effectiveness for unions, as reflected in their bargaining outcomes.

Consistent with this view, (Tros, 2023) reviews the evidence for European countries affected by bargaining decentralisation following the GFC and concludes that the trend is associated with a series of outcomes. These are grouped into two major areas[2]:

- Workplace union activity and strength weakened.
- Bargaining outcomes mainly benefit employers.

In summary, the primary claims of the literature are that that the decentralisation of collective bargaining after the GFC weakened bargaining coordination, especially in LME's, with negative outcomes for unions. Ireland is most commonly viewed as paradigmatic of these developments. These claims provide the guiding research questions of this study:

1. How has the decentralisation of collective bargaining in Ireland affected bargaining coordination?
2. What outcomes for unions and their members have resulted from company-level bargaining?

## 3 | RESEARCH METHODS

This paper adopts a combined quantitative and qualitative case study research approach to examine the features and effectiveness of collective bargaining in Ireland following the GFC.

First a data set comprising over 1400 pay deals negotiated in the main at company level between 2011 and 2022 was compiled by the authors and is used to examine sectoral and company-level trends in collective bargaining between unions and employers. The data set draws on *Industrial Relations News* reports on collective agreements in the private sector, supplemented by the authors' inquiries and research. This provides the most detailed and comprehensive data set available on the changing features of collective bargaining in Ireland since the GFC.

Second four company case studies were conducted. As the main bargaining unit post the GFC is the company, we selected major companies in which unions are recognised and well organised to examine how coordination occurred. Table 1 summarises the main features of the companies studied.

The rationale for choosing the four companies and their sectors are as follows:

[2]Several of Tros' (2023) trends have been merged for brevity and to avoid overlap.

**TABLE 1** Features of four case study companies.

| | PharmCo | FinCo | RetailCo | FoodCo |
|---|---|---|---|---|
| **Ownership** | Multinational | Irish-owned | Irish-owned | Multinational |
| **Trade union** | SIPTU | FSU | Mandate | SIPTU |
| **Union density** | Over 50% | 50–60% | 100% | 100% |
| **Industrial relations model** | Stable collective bargaining–pattern-setter in pharmaceuticals | Collective bargaining and workplace partnership | Collective bargaining and workplace partnership<br>Closed-shop agreement | Quasi-closed shop agreement |

1. The pharmaceutical sector, vital to the Irish economy, includes all top 10 global biopharmaceutical companies. Ireland's largest union, the Services, Industrial and Professional Trade Union (SIPTU), strategically targeted this sector for company-level bargaining after the collapse of social partnership. Data collection took place at a subsidiary of a major US multinational company known as PharmCo, recognised as pattern-setter in pay bargaining. PharmCo consists of three specialised plants. The studied site employs over 600 workers.
2. In the financial service industry, Irish banks faced a severe crisis after 2008, compounded by significant technological changes driven by automation and online banking. The Financial Services Union (FSU) is the sector's largest union. Data were collected from one of the largest Irish banks, referred to as FinCo, which employed over 9000 and was heavily impacted by the financial crisis. Following a government bailout in 2010, only a small share of the bank's stock remained in private ownership. The company underwent multiple rounds of restructuring, including branch closures, operational mergers, and substantial job losses. Despite an overall decline in the banking sector's industrial relations climate postcrisis, FinCo maintains a workplace partnership approach alongside collective bargaining.
3. Retailing is Ireland's largest industry, constituting 14% of the workforce. The company under investigation, RetailCo, is a major player in the grocery and food distribution sector, ranking among Ireland's largest private sector employers and employing around 300 thousand employees. RetailCo exhibits a more favourable disposition toward union recognition than many counterparts in the sector. It operates under a closed-shop agreement, mandating union membership for all its workers, with Mandate representing shop assistants and SIPTU representing butchers and bakers.
4. The food and drinks sector is a significant part of the Irish economy, contributing nearly 8% of all jobs and 10% of exports. Data were gathered from a subsidiary of one of the world's largest infant formula producers, referred to as FoodCo. The site examined employed approximately 200 workers, including 134 SIPTU members. An informal closed-shop agreement ensures 100% SIPTU membership and extensive collective bargaining coverage.

To gain an understanding of the role of the Irish Congress of Trade Unions Private Sector Committee (ICTU/PSC) in coordinating collective bargaining, an open-ended semi-structured interview was conducted with the ICTU Officer responsible for supporting the Committee. This

TABLE 2 Profile of trade union leaders interviewed at the sector and company levels.

| | ICTU | SIPTU | FSU | Mandate |
|---|---|---|---|---|
| Interviewees | Industrial officer | Senior official | Senior official | Senior official |
| Sectors for which sectoral interviewees are responsible | All sectors | Pharmaceuticals, food and drinks industry | Financial services | Retailing |
| Titles of interviewees at company level | | Lead negotiators at Pharmco and FoodCo | Lead negotiator at FinCo | Lead negotiator at RetailCo |

interview provided insights into the work of the Committee and how unions have conducted company-level bargaining following the collapse of social partnership.

Secondly, interviews were held with key union sectoral leaders representing the unions in the case studies (see Table 1). These interviews included a senior SIPTU official offering insights into negotiations in the pharmaceutical and food and drinks sectors. A senior FSU representative discussed bargaining activities in primary Irish banks, and a senior Mandate official examined developments in the retailing sector following the decentralisation of collective bargaining. All interviewed leaders are members of the ICTU/PSC.

Thirdly, as shown in Table 2 four semi-structured online interviews were conducted via Teams with lead company-level negotiators from PharmCo, FinCo, RetailCo, and FoodCo, representing SIPTU, FSU, and Mandate members. Each interview lasted approximately 1.5 h and aimed to capture the negotiators' positions, bargaining experiences, and outcomes, as well as their efforts to (re)engage members and activists following the collapse of social partnership. The interviews were guided by four key areas of enquiry, aligned with the research focus: (1) actors involved in company-level negotiations and union strategies, (2) instruments of internal union decision-making and democracy, (3) the evolution of collective agreement content, and (4) union perspectives on bargaining outcomes. Table 2 provides an overview of the roles of the union leaders involved in negotiations at the four companies. To validate the research findings, a focus group was conducted with the same research participants after completing the fieldwork.

To frame the choice of case studies and inform the analysis of collective bargaining in the four companies, a range of secondary data sources were also examined. These included reports on collective bargaining and union activities in the selected companies in weekly news reports published in IRN and relevant news reports in national newspapers. A range of union and the employers' organisation documents and reports were also examined. A series of business media sources and reports were also used to understand the commercial conditions of companies and the sectors in which they were located.

## 4 | RESEARCH FINDINGS

### 4.1 | Coordinated decentralised bargaining: Economy-wide patterns and outcomes

We begin by drawing on the pay database and multiple sources to locate collective bargaining in the case study companies in the wider context of economy-wide developments in collective bargaining in Ireland following the GFC. The GFC, which struck Ireland in 2008, was the death knell for the long period of 'social partnership', involving centralised tripartite pay bargaining, that spanned the period from 1987. Following the collapse of the social partnership, ICTU and the main employers' confederation, the Irish Business and Employers' Confederation (IBEC), agreed a 'protocol' to guide collective bargaining in private and commercial state-owned firms. The protocol prioritised job retention, competitiveness, and orderly dispute resolution. The ICTU–IBEC protocol framed the orderly decentralisation of collective bargaining to company level across most of the private sector and commercial state-owned firms (Roche & Gormley, 2017, 2018). Sectoral collective bargaining structures prevailed in a number of low-paid, low union density industries, and in construction and allied sectors. These were undermined by groups of employers mounting constitutional challenges in 2011 and 2013, leading to reforms and a weakening of the sectoral bargaining system, which continues to face opposition from groups of employers reluctant to reengage or repeatedly mounting legal challenges to sectoral pay awards.

Such was the scale of the economic collapse during the trough of the GFC that little scope existed for negotiating pay rises other than in the most resilient and profitable firms and in the multinational dominated export sectors (Gunnigle et al., 2013; Roche & Teague, 2015; Roche et al., 2013). In the severely depressed economy and labour market 'concession bargaining' between unions and employers, involving pay freezes and pay cuts, was widespread in the wake of the GFC (Roche & Teague, 2015; Roche et al., 2013).

When the economy bottomed out and began to revive around 2011 multinationals in profitable export sectors, relatively unaffected by the GFC, were targeted by unions to prime a generalised return to collectively bargained pay increases and improvements in conditions of employment. The process involved a radical reconfiguration by unions of bargaining strategies and coordination mechanisms, as will be revealed in detail in the case studies. This led initially to a form of coordinated company-level 'pattern bargaining' that was without precedent in Irish industrial relations (Roche & Gormley, 2017). This originated in the strategic targeting by the manufacturing division of Ireland's largest union, SIPTU, of strongly unionised firms in the pharmaceuticals, chemicals, and medical devices sectors. The objective from the start was to negotiate deals providing for average annual pay increases of 2% – matching or exceeding the trend in inflation (IRN, 24 November 2011).

While the 2% pay norm was widely conceded by employers, unions showed flexibility in agreeing deals that tailored the length of agreements to the commercial circumstances and product strategies of companies. Deals also included a range of improvements in conditions of employment covering such areas as reduced hours and extra leave, improved bonuses, and pension-related and private health insurance payments. Lump-sum retrospective payments were also made to cover periods between the termination of earlier pay deals and the negotiation of new agreements. Pay deals commonly contained clauses requiring cooperation by unions and their members with 'normal ongoing change'. Agreements also sometimes involved pledges about specific productivity improvements.

As revealed by modal annual pay rises in Figure 1, the 2% pay norm was clearly influential in shaping pay agreements. It was never however sacrosanct and deals above and below 2% were negotiated by unions and employers. Figure 1 shows the trend in median pay rises, as well pay dispersion, measured by the inter-quartile range (IQR).[3] Both median pay rises and the IQR

[3]The IQR – the range encompassed by the middle 50% of pay rises – is the preferred measure of pay dispersion as it removes the potentially distortive effect of extreme outlier pay rises and pay cuts.

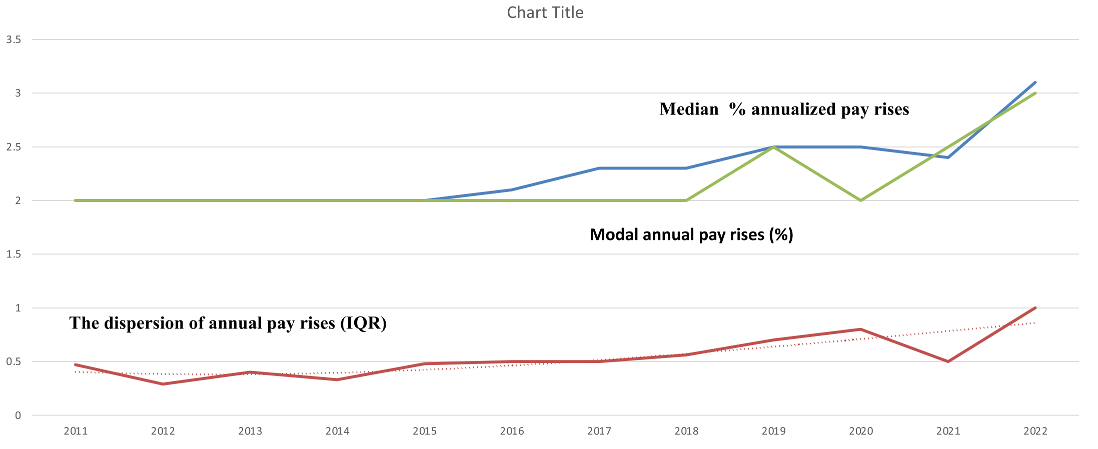


**FIGURE 1** Pay rises and pay dispersion. *Source:* Database of Pay Deals.

increased over the course of company-level bargaining. Median pay rises increased above 2% from 2015 onwards. The sharpest rise occurred during 2022, as inflation spiked to nearly 8%. While rises in basic pay that year failed to match the inflation rate, many collective agreements also included lump-sum payments, nontaxable vouchers and other benefits further offsetting the effects of inflation (IRN, 12 January 2023). Pay dispersion increased from 2018. Rising pay increases and growing pay dispersion marked a turning point in company-level bargaining. In 2017, SIPTU, the architect of pattern bargaining, announced that the '2% pay strategy was over' (IRN, 16 March 2017). Pattern bargaining evolved into a looser form of pay coordination, in which guidance by the ICTU/PSC explicitly envisaged a closer alignment between pay and the commercial circumstances of firms and sectors. Pay (increase) ranges replaced singular norms or minimum 'baseline' rises to guide unions' negotiating targets. Minimum cash rises and other measures were also recommended to protect lower-paid workers (Irish Congress of Trade Unions, 2015, 2016, 2019, 2021; IRN 14 December 2017, 10 January 2019, 5 December 2019). The ICTU/PSC recommended progressively higher pay and pay range targets for unions. While the higher range rises were seldom attained by many bargaining units, the ranges nevertheless guided unions to target and achieve higher pay rises. Pay rises and pay dispersion fell during the pandemic. This reflected the postponement of negotiations on new pay deals, the deferral of phased pay rises in deals already agreed, a return to concession bargaining in sectors acutely affected by the virus and the general effects of covid conditions on the economy and the labour market.

The outcomes of pay bargaining since 2011 have been assessed favourably by unions, as the case study interviews will reveal. The 2% norm effectively established a floor under pay bargaining, protecting union members in weaker firms. By 2020 only 8% of pay deals involved settlements below 2% and these reflected serious commercial difficulties and the effects of the Covid pandemic. The ratio of median to the lowest 25% of pay rises fluctuated over the period but did not rise, indicating that those experiencing the most modest rises were not disadvantaged by the ICTU/PSC's evolving strategy.[4]

[4]Values varied between 1.1 and 1.3, with the highest disparities occurring during the earlier period of company-level bargaining.

For most of the period of company-level bargaining the rate of inflation remained well below 1% and union members enjoyed progressively higher real wages. Between 2011 and 2022, the compound cumulative median pay increase was just over 30%, whereas inflation over the same period rose by just over 17%.[5] Rising pay dispersion was consistent with unions' efforts to shift negotiations from a basic 2% basic pay norm to a varying range of pay rises.

Coordinated bargaining had advantages for employers and no converse pay strategy emerged from IBEC. The 2% pay norm that held sway over much of the period post the GFC was affordable to many employers. With few exceptions strikes over pay were avoided and levels of industrial conflict post 2011 were the lowest in the history of Irish industrial relations (Roche et al., 2023). Pay bargaining contributed to Ireland's competitiveness, with nominal unit labour costs falling relative to major trading partners.[6]

## 4.2 | The architecture of coordinated bargaining: The case studies

### 4.2.1 | Vertical coordination

Before 2017, vertical coordination was guided by the 2% pattern bargaining norm introduced by the Manufacturing Division of SIPTU. However, from 2017 onwards, central vertical coordination was facilitated by the ICTU PSC. These guidelines were influenced by the ICTU-aligned Nevin Economic Research Institute and took into account factors such as the cost of living, sector-specific earnings, and forecasts from the Central Bank and EU Commission. Negotiators at PharmCO and FoodCO in the pharmaceutical and food sectors used these guidelines as a basis for negotiations. In the retail sector, a Mandate's senior official found national-level deliberations helpful for understanding bargaining priorities but considered ICTU targets overly ambitious. Unions, particularly FSU in the financial service sector, do not view the informal coordinating role of Congress as a drawback. Instead, they see it as an opportunity because this ‘weak, external coordination’ encourages unions to establish stronger links with members at the organisational level.

> I think trade unions need to be stronger, as close to members as possible, because it makes them more democratic, more responsive – and that way we can organise new members better, so actually I'm in favour of decentralised power within the trade union movement. (Senior Official, FSU)

The coordination system provided by ICTU was described as ‘informal’ as there were no sanctions or other mechanisms for negotiators at the local level that decided not to adhere to the ICTU guidelines. Given the loose coordination offered at centralised level, unions, in each sector, have developed their own processes of coordination for companies in which collective bargaining occurred. Such processes relied on three formal stages which we will now detail.

[5]The compound cumulative median pay increase was calculated based on the data in Figure 2. Data on the change in the retail price index was obtained from the Central Statistics Office at https://www.cso.ie/en/statistics/prices/consumerpriceindex/

[6]For details of the trend see Central Statistics Office *Productivity in Ireland 2017*, https://www.cso.ie/en/releasesandpublications/ep/p-pii/productivityinireland2017/ulc/#:~:text=In%202016%2C%20unit%20labour%20costs-productivity%20and%20nominal%20employee%20compensation.

Firstly, local negotiators identified a pay target for negotiation. In the cases of PharmCo and FoodCo, they relied on a sector-specific SIPTU target derived from various indicators: the Central Bank's projected inflation rate, wage increases in IG Metall and data from the ETUC and the ETUI regarding high-end manufacturing pay trends across Europe. Similarly, at RetailCo, negotiators adopted a pay target from sectoral union officials, who internally discussed ICTU guidelines and compared them to sector-wide performance data. Mandate sectoral leaders also considered factors like staff reductions, company closures and Labour Court recommendations. The sectoral target aided RetailCo shop stewards in forming realistic expectations. At FinCo, the process for determining pay targets largely resembled that of other companies. However, there was a significant difference: negotiators also took into account pay developments in the public sector. This arose because the Irish Government had bailed out FinCo during the financial crisis, making public sector pay trends influential:

> The bank will not sign off on a 3% pay rise because it's state owned and the State will be watching what is being paid by the bank because that'll influence what happens with the public sector. So [. .] while they say they don't interfere – they still keep an eye [on banking pay settlements]. (FSU Lead Negotiator)

Secondly, company-level negotiators assessed the company's financial position within a confidential process. At PharmCo, this involved the Human Resource (HR) Director, Chief Financial Officer, sector-level trade union official, and lead company-level negotiator examining the company's financial statements. At RetailCo, the negotiating team evaluated available data on the company performance, including information shared by store managers within the Store Forum Committees – a bipartite committee comprising local management and trade union representatives. Moreover, three full-time union negotiators, including a sector level representative, reviewed the company's financial records with the HR Director. In FinCo, company negotiators with a sector-level official, and the HR team analysed the Bank's financial position, taking account of indicators such as economic performance, staffing levels, and previous agreements. Unlike other companies, FoodCo did not grant the sectoral official and the lead shop steward access to the company's financial records in this process.

> The only time the company is willing to show its books is when they are going bad and it can't pay the pay increase – if we ask for the books, they'll say NO, that's confidential information. (Lead Negotiator at FoodCo)

However, SIPTU acknowledged that the management is collaborative during negotiations. Its counterpart came to the bargaining table well prepared to provide evidence on the company's performance. The data shared also provided a reality check for shop stewards and members.

Thirdly, unions in each sector developed effective methods to engage activists and members in decision-making on pay claims. Once the company's pay target was established, it was communicated to all PharmCo members via an online questionnaire, along with other potential collective bargaining concerns. A meeting was then conducted, during which SIPTU negotiators at PharmCo listened to members' input and presented an initial collective bargaining proposal. After gaining insights into the company's financial performance, a second meeting with members was held to re-evaluate the draft proposal, considered a crucial phase for managing members' expectations. If the final proposal received approval, the negotiation process commenced. The most delicate stage involved preparatory work with members, during which the lead shop stewards and sectoral official secured an official mandate. In a similar manner, Mandate conducted surveys of all members in RetailCo stores to gather input on specific items for the upcoming bargaining round. The negotiating team identified the primary priorities for collective bargaining, taking into account members' expectations, the principles outlined in the *Union Charter for Decency and Respect in Retail*,[7] and the company's performance data. Discussions on pay bargaining at RetailCo culminated in an official draft proposal ratified by shop stewards representing all stores. Once the mandate was obtained, the Union contacted the company to initiate company-wide talks, starting the official negotiation process. The draft agreement was then presented to all shop stewards, who decided on its acceptance or rejection. After shop stewards approved the deal, members were balloted.

> When we [negotiating team] bring together all the survey results, we'll correlate them with the requests of shop stewards at the general meeting. And let's say that the cost-of-living increase is the number one issue – usually pay is the number one issue, right? We would put in a number and explain to the shop stewards: listen, this is what ICTU is recommending, through its Nevin economists. And this is what the general flavour out there within retail is. And this is what companies have given in the recent past. And here is where we [RetailCo] are at financially. We nearly negotiate with the shop stewards, and they essentially say OK, our claim clearly is 3%, 3.5% and 2%. (Lead Negotiator at RetailCo)

At FoodCo, the negotiators discussed the average sectoral pay increase to determine an acceptable raise for members, while shop stewards consulted and informed members on any decisions made regarding pay and other bargaining matters. Once an acceptable pay increase was identified, a general meeting was arranged, allowing members a week to reflect on the deal and ask questions. If consensus was not reached, the union returned to management for possible amendments. SIPTU only scheduled a ballot when there was union base agreement. Members rarely rejected a proposal if it was recommended for acceptance.

Against a backdrop of bargaining decentralisation, FSU established perhaps the most sophisticated system to coordinate negotiations and, especially, to ensure a high level of member participation. This was evident at FinCO. Each local FinCo branch appointed a 'point of contact' who acted as a liaison between the union and its members. For banks like FinCo with multiple branches, these local contacts were coordinated by elected 'Area Coordinators,' pivotal in connecting (1) workplace-level union members, (2) the FinCo Sector Committee responsible for company-wide bargaining decisions, and (3) the General (sectoral) Council, comprising officers from FSU Sector Committees across the financial sector. Given this constant interaction between different groups of union representatives at varying levels (FinCo Area Coordinators, the FinCo Sector Committee, and the FSU General Council), at FinCo, an increasing number of items progressively appeared on the bargaining agenda. In sum, unions developed mechanisms of vertical coordination by linking ICTU and company level negotiating structures to the sector level via full-time sectoral union officials. By identifying a pay target and participating in the company-level negotiations, trade union officials made sure that the

[7]Document produced by Mandate after the collapse of national social partnership to establish the values and principles guiding collective bargaining in all unionised companies in retailing.

sectoral strategy took account of national guidelines and was implemented consistently across companies, achieving broadly similar pay outcomes for members. The vertical coordinating systems developed vary across the studied companies. However, they all revolved around three essential stages. First, sectors derived a pay target based on macro-economic indicators and wider European trends in sectoral pay bargaining; second, local negotiators, supported by sectoral officials reviewed the financial position of companies; and finally, unions involved members and activists in shaping the agenda for collective bargaining thereby obtaining a strong mandate within each company.

### 4.2.2 | Horizontal coordination

Starting with pharmaceuticals, the process of horizontal coordination between unions remained largely informal. The most representative unions in pharmaceuticals are SIPTU and the craft union, Connect. As they represent different categories of workers, they rarely competed for members. In some companies, employee representatives of SIPTU and Connect negotiated together in a single bargaining unit, called the Group of Unions, under the coordination and supervision of Congress. Unite is a British trade union that also operates in the Republic of Ireland. It is affiliated to ICTU but is a relatively smaller union in the sector. The relationship that SIPTU and Connect have with Unite is limited to the workplaces where Unite has some form of representation. However, it is loose and notoriously complex.

In companies in which unions do not bargain together, as at PharmCo, coordination occurred primarily by word of mouth between the trade union officials and the shop stewards involved in negotiations. SIPTU and Connect at PharmCo generally signed the same agreement, with occasional minor differences in the final deal depending on the agenda items and the category of workers. However, both unions agreed with the employer on consistent pay increases across the company. A week before parallel negotiations began, SIPTU and Connect committees met formally to develop a common strategy and finalise agenda items. These two union representatives maintained a close working relationship with ongoing informal conversations. This collaborative approach extended beyond PharmCo, with coordination occurring at the Congress level, where sector-level union officials met and shared strategies, building personal relationships and discussing bargaining topics and outcomes informally.

> Trade union officials just normally talk about what we do [...] and generally, if you go above what the norm is, we do let people know; and also below, we let people know so as to be warned, you know [...] just taking PharmCo, for example – and if at PharmCo we can't go over 2% and can't afford it any more, that's what's coming down the track, so that's how it happens. But it wouldn't be any formal meeting; they're just general conversations that we'd pick up. (Lead Negotiator at PharmCo)

Circumstances were different at FoodCo. At the subsidiary where data were collected, the company recognised SIPTU, representing the large majority of employees, and Connect. However, unlike in PharmCo, at FoodCo there is no formal coordination between them. The interviews reveal that the relationship between the two unions was not collaborative.

> In many [manufacturing] companies, SIPTU and Connect would have a joint committee and we would negotiate together [...] But in FoodCo there is history and

> we negotiate separately – that's an anomaly in FoodCO between Connect and SIPTU. (SIPTU Lead Negotiator)

Rather anomalous to the cases no coordination of collective bargaining occurred across FoodCo subsidiaries. In the Southeast site, the most representative union is Unite, which, in the Republic of Ireland, has virtually no links with SIPTU. There was informal contact between the Lead Negotiators at the two sites but very limited information sharing. Moreover, the bargaining rounds at FoodCo were not synchronised. While, in the South site, agreements had a duration of 3 years, in the Southeast site, they were renewed every 2 years. This reduced the possibility for a common strategy. In 2018, the Southeast division concluded a collective agreement with Unite that the management tried to extend to the South site without discussing it with SIPTU. That incident temporarily eroded the relationship with management, which was eventually repaired. However, it interrupted any limited, pre-existing collaboration between the two unions. This lack of coordination across sites again is an anomaly. The interviews suggest that in most of the multidivisional companies operating in Ireland, unions share bargaining tables, adopt common bargaining strategies, and sign similar deals.

At RetailCo, Mandate and SIPTU negotiated together with a formal coordination system in place. Representation structures at store and company levels included members from both unions. Mandate, with its larger member base, typically led in defining the collective bargaining strategy. The National Group of shop stewards, involving shop stewards from all stores, played a pivotal role in coordinating bargaining strategy across RetailCo locations. This group served as a link between members and the National Negotiating Team, an elected group of shop stewards handling collective bargaining. It ensured that members' expectations aligned with the union's strategy throughout the bargaining process. The Group met formally and informally to gather members' views and steered members' demands in different stores.

> Shop stewards are the best barometer, right? They know if the company is doing well, they know their store people–they'll know that through the Store Forum process as well. (Lead Negotiator at RetailCo, member of the National Negotiating Team)

At FinCo the interviews with FSU representatives unveiled three different mechanisms of horizontal coordination within the banking sector, namely (1) coordination between multiple unions operating in the same workplace, (2) coordination between FSU representatives across branches (within the same bank), and (3) coordination between FSU negotiators across banks (within the same sector). Each of them will be described in turn.

Coordination among FSU and other unions like SIPTU and Unite was highly informal, mainly due to representing distinct worker categories and not negotiating jointly. FSU predominates in the banking sector. Negotiators from various unions know each other personally through interactions at the ICTU/PSC. However, while some FinCo employees are Unite members, the bank does not formally recognise Unite for bargaining purposes. The FinCo Sector Committee, particularly the Officer and FSU Lead Negotiator, regularly engaged with the Unite Official and shop stewards. For instance, after reaching a pay agreement, FSU negotiators informed Unite colleagues as a gesture of courtesy. Unite then balloted their members on the agreed pay rate but could not alter the deal. As SIPTU represents porters in retail branches and FinCo head offices, FSU negotiators provided periodic updates but no regular contacts occurred.

Second, FSU implemented an efficient structure for company-wide collective bargaining. Although negotiations were conducted at individual FinCo branches, critical matters like pay were addressed at the company level. This necessitated the creation of a joint collective bargaining platform involving union representatives from various FinCo divisions. FSU utilised a wide network of regional members, including 70 FinCo Area Coordinators, to ensure continuous communication between members and representatives in different branches. Furthermore, horizontal coordination within FinCo occurred within the Sector Committee itself, where all FinCo shop stewards convened to establish shared priorities for collective bargaining. Committee members regularly liaised with the Area Coordinators in their regions to exchange information and receive feedback on local developments. In essence, both formal forums (the Sector Committee) and informal mechanisms (ongoing communication between Area Coordinators) facilitated coordination among FSU representatives across the FinCo divisions for collective bargaining purposes.

Third, within-sector coordination amongst FSU negotiators takes place in the General Council, in which the Officers of all the Sector Committees operating in the banking sector agreed a common bargaining strategy. FSU Lead Negotiators met formally four times a year and informally every Monday to discuss developments in different banks. The conversations between them revolved primarily around items for collective bargaining. While there was agreement regarding the proposed average pay target across the sector, the ways in which the actual increases were calculated by each Committee may have differed to reflect bank-specific requirements. In addition to pay claims, the FSU Lead Negotiators at different banks kept each other informed about other potential bargaining items of interest to members. Some items were company specific, such as the working hours at FinCo, but, in most cases, FSU officials aimed to achieve whatever their colleagues elsewhere had already obtained.

In sum, the case study findings show that unions made substantial efforts to coordinate collective bargaining horizontally after the collapse of national social partnership. However, the type of coordination varied. Across companies, unions coordinated mostly by organising formal and informal meetings amongst the Lead Negotiators, who, by sharing information, ensured that their bargaining strategy remained coherent. The role of ICTU is relevant in this regard as besides offering national guidelines, it also provided a platform, through the PSC, where negotiators from different unions shared information. Across bargaining units within the same company, coordination was greater where local negotiators had a positive and strong personal relationship, such as at PharmCo, or where all unions were part of workplace partnerships that involved them sitting at the same bargaining table as in RetailCo and FinCo. At FoodCo where trade unions did not collaborate, horizontal coordination did not occur. Nor however, did the unions engage in ongoing interunion competition around terms and conditions of employment; occasional tensions, like those between the South and Southeast plants of FoodCo failed to disrupt the coordination activities of the other unions.

## 4.3 | Bargaining outcomes

Contrary to what comparative literature suggests, our examination of company cases in Ireland does not support the expectation that the decentralisation of collective bargaining has (a) weakened workplace union activity and strength (b) led to bargaining outcomes mainly beneficial to employers. Importantly, all trade union leaders interviewed, whether at the national, sectoral, or company level, reported a significant level of satisfaction with the outcomes of decentralised bargaining. Notably, none of the interviewees expressed an interest in reviving national social partnership arrangements, which were perceived as hindering unions' ability to involve members and activists in collective bargaining and, ultimately, disempowering unions.

> I think decentralised bargaining is good for SIPTU and good for the union movement – because it's given the power to members – that 'feel good' factor to shop stewards and activists who negotiate the deals themselves – and it's not seeing [it] as [a deal] done by the leaders 'above in Dublin' – that's what it was viewed at the time [of national social partnership] – oftentimes we had members thinking that they were getting the government pay increase instead of unions' one. (SIPTU Lead Negotiator at FoodCo)

Following the framework developed by Tros (2023), discussed above, a summary of the main findings concerning the nature and outcomes of company level bargaining in the four case studies is presented in Table 3. Further detail is provided in the section that follows.

### 4.3.1 | Workplace union activity

The supra-company vertical and horizontal coordination, outlined above, was anchored in workplace bargaining and democratic union participation arrangements. At PharmCo, SIPTU established 'The Committee,' a formal workplace representation structure, featuring ten shop stewards, each responsible for a distinct company division. The Committee operated under the leadership of a democratically elected Chairman, with the guidance from a sector-level union official employed by SIPTU but external to the company. This Committee served as the focal point for all discussions related to collective bargaining; while it defines the bargaining agenda, considering input from surveyed members, only the Chairman and the Sectoral Official participate in the actual bargaining process. Within the Committee, the shop stewards directly oversee employment terms and conditions and advocate for their members' specific interests within the company. At FoodCo, SIPTU also operated through a negotiating structure called the Committee, comprising skilled shop stewards who shape the agenda and manage the bargaining process. Members were elected based on their roles and responsibilities, with a 1-year tenure, and the chief shop steward was nominated by the Committee itself.

> Our Committee is so strong that it ensures that whoever joins the company will also become a member of SIPTU. (SIPTU Lead Negotiator at FoodCo)

RetailCo features a dedicated company-specific negotiating structure, called the 'National Negotiating Team.' This team consists of two full-time Mandate officials, with one serving as the Lead Negotiator, a SIPTU official, and a committee of five shop stewards. The committee is elected by all store shop stewards and remains in place throughout the collective agreement duration. Additionally, each store features formal workplace partnership arrangements with the 'House Committee,' addressing any organisational issues that may be important to workers and a 'Store Forum Committee' convening around 12 times annually. Both the House and Store Forum Committees served as vital channels for members' involvement and for expressing their concerns.

Finally, at FinCo, FSU established the 'Sectoral Committee' to negotiate on behalf of all FinCo employees in Ireland and the UK. FSU members who work at FinCo elect their

**TABLE 3** Effects of bargaining decentralisation on union effectiveness.

| | PharmCo | RetailCo | FinCo | FoodCo |
|---|---|---|---|---|
| **(a) Workplace union activity and strength** | SIPTU established an effective formal, elected, workplace negotiating structure.<br>Effective use of strike threat to defend working conditions.<br>Union gains greater influence in shaping the bargaining agenda. | Mandate established new negotiating structure and effectively maintains multiple formal workplace partnership arrangements.<br>Union gains influence over restructuring after the financial crisis. | FSU established an effective formal, elected, workplace negotiating structure.<br>Effective use of strike threat to defend working conditions.<br>Bargaining and partnership structures extend union influence. | SIPTU established an effective formal, elected, workplace negotiating structure.<br>The union's 'quasi closed-shop agreement' facilitated gains for union (e.g. the conversion of temporary contracts into permanent positions after 12 months). |
| **(a) Bargaining outcomes** | Steady year-on-year improvements in pay that exceeded median pay rises for sector.<br>Bargaining extends to health insurance, parental leave, sick pay, holidays, organisational flexibility, training (digital skills). | No clear trend in pay rises but improvements in pay achieved.<br>Bargaining extends to paid time off work, increased staff discounts, specific conditions on wage increases. | Steady year-on-year improvements in pay that exceeded median pay rises for sector.<br>Bargaining extends to maternity leave, parental leave, the right to disconnect, and remote working protections. | Steady year-on-year improvements in pay that exceeded median pay rises for sector.<br>Bargaining extends to health insurance, pensions 'sick and accident schemes,' and annual leave. |

Committee representatives in each region where the bank operates for a 3-year term. The elected Committee then designates one member as the Lead Negotiator, referred to as 'the Officer,' who is seconded into FSU and receives payment from the company to fulfil union responsibilities as a full-time employee representative.

The interviews with union leaders highlighted the critical role of proactive and robust local unions in enhancing the active involvement of shop stewards in the negotiation process, as well as in promoting member support and collaboration. Without exception, they indicated, that following the demise of national social partnership agreements, there has been an upsurge in bargaining activity at the local level, resulting in a stronger connection with their members.

> You know a lot of the times when the pay rates were set as at the national level, usually we [national officials] would sit down with a company and argue and say: 'Are you going to pay the rate of pay that's been agreed?' And you know the meeting goes ahead and might last half an hour and the company will lay out their position that they are struggling blah blah. Now definitely a lot more negotiations are taking place. Before [...] there was always something in the bigger picture coming down the road – now it's clear negotiations are taking place at the company level. (Lead Negotiator at PharmCo, SIPTU)

At FoodCo, SIPTU's ability to onboard new employees early and introduce them to the union's role has been key to maintaining a 100% union density. Proactive shop stewards played a crucial role by continuously relaying members' concerns to the negotiating team, informing collective bargaining strategy. The increased member engagement in shaping the bargaining agenda made joining the union more appealing than in the past. Shop stewards at FoodCo effectively used the threat of industrial action to rally members and force the company to listen to their demands. A notable example occurred in 2018 when management were prevented from extending an agreement from another union to FoodCo without SIPTU's approval.

SIPTU at PharmCo has shown its members that mutual support at the company level enhanced their potential for significant advancements when working conditions were threatened. The union took a militant stance during protracted negotiations on pensions, supporting their members' willingness to strike if necessary. Their efforts eventually convinced management to abandon their own agenda.

In both RetailCo and FinCo, where a workplace partnership approach was in place, unions regarded decentralised bargaining as an opportunity to promote a culture of industrial democracy within the company. This culture encouraged collaboration between unions, shop stewards, and managers to address various workplace issues. At RetailCo, the union adopted a new bargaining process. This involved conducting regular surveys, where members listed their preferred bargaining items, analysing the results, sharing them with constituents, and ultimately agreeing on a potential bargaining agenda, subject to a ballot before negotiations.

### 4.3.2 | Bargaining outcomes

Our four case studies do not confirm the expectation of bargaining outcomes heavily weighted in favour of employers. On the contrary, collective bargaining consistently delivered positive outcomes for workers across the companies investigated.

For instance, at PharmCo, SIPTU PharmCo, achieved pay deals that exceeded sectoral norms. Its role as a ‘trend setter’ initially led to pay deals that were comparable to median pay rises in the sector. However, since 2016, SIPTU negotiated agreements with increases that exceeded the 2.5% sectoral median rise, such as a 3.6% pay raise in 2018 and a significant 2.7% annual increase over 4 years in 2021.

RetailCo's agreements, established since 2011, demonstrated a progressive increase in pay rises, aligning with economic and sector-wide trends. A 2-year agreement in 2022 aimed to reduce pay disparities across employees, by providing a minimum 4% increase for lower paid workers. FinCo faced challenges following the financial crisis but resumed pay deals in 2015, consistently exceeding median sectoral pay rises. From 2015 to 2018, SIPTU and FoodCo agreed on a 48-month pay deal with significant average pay increases of just over 4% per year, surpassing sectoral pay norms in the food, drink, and agribusiness sector.

The interviews reveal that the scope of collective bargaining has significantly *expanded* in the past decade in all the companies studied. Health insurance, parental leave, sick pay, holidays, training, and education have all become common subjects of negotiation. Notably, at PharmCo, these issues are discussed with the company in exchange for enhanced work flexibility and improved digital skills among workers. Similar trends were evident at RetailCo, where Mandate highlighted the positive impact of company-level bargaining on the variety of issues local negotiators can address. Recent collective agreements have included additional paid time off work, increased staff discounts (currently at 12.5%), and hourly wage increases for the lowest-paid employees. This has been a significant improvement for the most vulnerable and precarious employees. In of FinCo issues like maternity leave, parental leave, the right to disconnect, and remote working protections have entered collective agreements. SIPTU at FoodCo also reported the broadening scope of collective bargaining, with issues such as health insurance, pensions ‘sick and accident schemes,’ and annual leave gaining importance in recent years. Unions have responded by addressing these items in local negotiations.

In all case study companies unions were determined to build workplace bargaining and participative structures that would strengthen collective bargaining and anchor coordination in participative and democratic membership engagement. The results were evident in bargaining outcomes. In addition to consistent wage gains unions made significant progress on a wide and widening range of issues in the companies examined.

## 5 | DISCUSSION AND CONCLUSIONS

The comparative European literature on collective bargaining after the GFC highlights bargaining decentralisation as the predominant trend. This trend is viewed as having been damaging to pay coordination and to outcomes attainable by unions and their members, especially in LMEs such as Ireland.

In our view, bargaining decentralisation in Ireland confounds these claims. Unions adapted to the radical shift in collective bargaining from national to company level by developing effective new forms of vertical and horizontal coordination that delivered significant outcomes. Here we seek to account for these forms of coordination and associated outcomes arose by highlighting a series of institutional and economic features of the Irish case.

Beginning with vertical coordination, during the long social partnership era, unions employers and governments coordinated pay rises and cooperated on a wide range of policies for the management of the economy at both national and local levels through the networks of institutions. As our cases show, after the collapse of social partnership, the negotiation process involved in more than twenty years of national pay agreements cast a long shadow over decentralised pay bargaining. On the one hand, the centrally determined pay rises that had been a core feature of national pay agreements had accustomed unions and employers to adopting pay 'norms' as reference points for pay claims. On the other hand, the recommendations of the Labour Court in pay disputes took account of prevailing pay increase norms and served to institutionalise these within pay bargaining. Such features of decentralised bargaining and dispute resolution following the GFC led some observers to portray pattern bargaining norms as 'shadow national deals' (Industrial Relations News, 23 July 2015 1,6 June 2016).

Vertical coordination was reinforced by competitive pressures on employers. In opting for a 2% pay norm, the Manufacturing Division of SIPTU took into account pay rises in German manufacturing and the inflation forecast of the European Central Bank (Industrial Relations News, 23 July 2015). The 2% was also seen as affordable to many employers across the economy as economic revival was in train. Pay deals of varying duration were agreed to accommodate different product cycles and the predictability or otherwise of commercial conditions facing employers. When the 2% norm was replaced by PSC guidance on bargaining within a pay-rise interval, the research facilities of the ICTU-linked Nevin Institute were harnessed to advise the PSC and its member unions on macro-economically appropriate and sustainable pay targets. It was clear from the case study firms that these parameters were considered in company-level pay negotiations. Unions' efforts to accommodate competitive pressures through vertical coordination reflected the remarkable openness of the Irish economy by European and international standards. In 2011 the value of combined exports and imports for Ireland, the so-called trade ratio index, was 188%; this had risen to 237% by 2022. The EU's trade ratio for 2022 was 105% (World Bank, 2023). In competitive conditions such as these, company-level pay coordination in Ireland reveals responsiveness to international economic pressures evident in sectoral pattern bargaining in Germany, Austria and other European countries with coordinated market economies (International Labour Organisation, 2023).

The coordination of company-level pay bargaining by unions was also enabled by the largely accommodating postures of employers towards unions in the wake of the GFC. Employers in Ireland avoided launching a frontal assault on union recognition or collective bargaining during the crisis. Their focus instead was on shortening bargaining cycles and pragmatically gaining agreement on retrenchment programmes (Roche & Teague, 2014; Roche & Teague, 2015). As a result, when economic conditions improved, unions in major companies, such as the case studies, were well placed to engage constructively with their employer interlocutors and to shift from concession bargaining to bargaining for improvements in pay.

Moving to horizontal coordination, here interunion relations were a significant contributor to pay coordination. During previous periods of company–level and sectoral pay bargaining, interunion competition and 'competitions in militancy' had been central to the emergence and features of 'pay rounds'. It was commonplace for early pay settlements – often originating in sheltered construction and allied trades sectors – to become points of reference for launching higher pay claims by rival unions. Little interunion cooperation was evident (McCarthy et al., 1975).

The transformation in the structure of Irish unions by the 2000s significantly increased their capacity to coordinate pay negotiations and reduced interunion competition focused around pay and competitions in militancy. At the outset of coordinated bargaining, in 2011 the number of unions had declined to a historical low of 35 as a result of a wave of mergers unprecedented in Irish trade union history (McPartlin et al., 1997). This reduced pressures and incentives for competitions in militancy. Unions also revealed a growing appetite for pooling resources and for cooperation in such areas as organising campaigns and the sharing of local facilities. (Irish Congress of Trade Unions, 2011; IRN 28 October 2021, 21 January 2016).

Contrary to the expectations of the comparative literature, the cases reveal that Irish trade unions were satisfied with the outcomes of company-level bargaining and this reflects unions' verdict more generally. Significant improvements in pay and conditions were negotiated. Pay coordination put a floor under pay rises. The scope of collective agreements was widened. Management-union collaboration was deepened and unions gained access to information and achieved more influence over company decision-making. Anchoring coordinated bargaining in new workplace structures involving activists and members strengthened union democracy and promoted union revitalisation.

Coordinated company-level bargaining is not a panacea for all union objectives. Unions continue to face serious challenges arising from the declining coverage of collective bargaining, now standing at about 34% and from the long-run decline in trade union density, currently 23%. Continuing legal challenges to sectoral bargaining arrangements and employer resistance to union recognition loom large as concerns of trade unions. Unions have responded to these developments by seeking changes in the law through social dialogue – these are currently pending – and by seeking to reinvigorate organising (Doherty, 2022; IRN 28 October 2021).

These wider challenges aside, what – following the comparative literature – remains the unlikely success of pay coordination in Ireland's LME, highlights a series of features of Ireland's LME. The effective vertical and horizontal coordination of company-level bargaining by unions in Ireland are shown to be predicated on legacies, institutions and market pressures not associated in the literature with pay coordination in LMEs. While the general heuristic value of the LME-CME dichotomy cannot be doubted, the presence of effective forms of pay coordination in a LME both reveals the limitations of these market types in accounting for major features of national cases and highlights the shortcomings of comparative portrayals of trends in collective bargaining after the GFC.

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## CONFLICT OF INTEREST STATEMENT

The authors declare no conflict of interest.

## DATA AVAILABILITY STATEMENT

The data that support the findings of this study are available on request from the corresponding author, Valentina Paolucci. The data are not publicly available because they contain information that could compromise the privacy of research participants.

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