



## Employee Relations

Annual hours, workplace partnership and mutual gains: exploring the links  
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# Annual hours, workplace partnership and mutual gains: exploring the links

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## Abstract

**Purpose** – The purpose of this paper is to explore the capacity of annual hours (AH) to deliver gains to both workers and management and assesses the role of workplace partnership in three Irish companies that have adopted AH.

**Design/methodology/approach** – Three case studies are compared and contrasted. The case studies were compiled through semi-structured interviews with management and trade union representatives, a survey of 205 workers and secondary material.

**Findings** – The authors find that workplace partnership is not a prerequisite for achieving mutual gains where AH are concerned. The research draws attention to the importance of a mechanism for the creation of gains, in these cases, AH and that such gains can arise from different processes. Mutual gains output is not confined to workplace partnership but can arise from collective bargaining.

**Originality/value** – The paper highlights the importance of comparing case studies so that the role of factors often seen as causal to mutual gains in exemplar cases can be critically evaluated. It also utilises directly workers' opinions on AH and workplace partnership where typically, representative views of management and trade unions dominate the literature on these issues.

**Keywords** Employee relations, Collective bargaining, Annual hours, Mutual gains, Workplace partnership

**Paper type** Research paper

## Introduction

Annual hours (AH) is a flexible work practice that has been associated with mutual gains and often accompanies workplace partnership (Arrowsmith, 2007; Bell and Hart, 2003; Gall and Allsop, 2007; White, 2010). While the relationship between workplace partnership and mutual gains has been widely debated in the literature (Ackers and Payne, 1998; Glover *et al.*, 2013; Guest and Peccei, 2001; Haynes and Allen, 2001; Kelly, 1996, 2004; Kochan and Osterman, 1994), the link between AH and mutual gains has received much less attention from academics. In this paper, we examine the processes used to introduce AH and the outcomes of gains for workers and management in three Irish companies. Outcomes are assessed both in measurable, objective terms and in relation to perceptions of the key industrial relations actors and workers involved. We assess the extent to which these gains are perceived as a result of workplace partnership or AH. The first company is an “exemplar” case of workplace partnership; the second also introduced AH as part of a workplace partnership initiative and in the third company, partnership played no role. We find that workplace partnership is not a prerequisite for achieving mutual gains where AH are concerned. The research draws attention to the importance of a mechanism in creating the gains in the cases chosen,



namely AH, but also that such gains can arise from different industrial relations processes. The paper begins by reviewing the literature on workplace partnership and mutual gains, identifying three key perspectives. Next, the links between AH, workplace partnership and mutual gains are developed. The paper then details the methodology used in the study and presents the three case studies. An analysis of the case studies follows which allows inferences to be drawn in relation to the prospects for mutual gains from both AH and workplace partnership and the interplay between these factors. The paper concludes by revisiting the three perspectives on workplace partnership and AH and discusses the findings from the case studies in light of these. Finally, we offer observations on the implications for practice and suggestions for future research.

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### **Workplace partnership and mutual gains**

Most studies of partnership agree that it is a somewhat amorphous concept to define and there are blurred lines between principles, processes and outcomes of partnership (Guest and Peccei, 2001; Martinez-Lucio and Stuart, 2004; Roche, 2009; Teague, 2005). We conceptualise workplace partnership as a process. Outcomes in terms of improved relationships may reinforce the legitimacy of this process and partnership as a “way of doing business”. Partnership as a process closely reflects the concept of integrative bargaining (Roper, 2000) which advocates a move from adversarial towards collaborative relationships and emphasises the prospects of mutual gains for management and unions (Fisher and Ury, 1983; Walton and McKersie, 1965). In an Irish context, workplace partnership arose from, and was underpinned by, national level social partnership for some time and national agreements involved deliberate efforts to extend partnership to workplace level. Workplace partnership may involve “forums” where management and union representatives meet to discuss issues which often exist in addition to established collective bargaining arrangements (Wallace *et al.*, 2013). Common to most understandings of workplace partnership is that it involves a commitment by unions and employers (often formalised in a “partnership agreement”) to work collaboratively, especially in managing change, with a view to mutual gains (Upchurch *et al.*, 2008).

There are three key perspectives which centre on the role of workplace partnership in delivering mutual gains. The first is the optimistic perspective which sees partnership as delivering mutual gains to workers and management although it identifies the need for “guiding principles” which are said to be necessary for gains to be realised. These include principles at the strategic, functional and workplace level, for example management commitment, investment in training and development and employee involvement in problem solving (Kochan and Osterman, 1994). Partnerships which do not embrace these principles are faced with legitimacy and sustainability problems as they fail to deliver real and substantial mutual gains (Roche and Geary, 2005; Teague and Hann, 2010). The second is the pessimistic approach which is provided by critics of partnership. They claim it offers no gains to workers and instead may actually involve losses in the form of work intensification, job insecurity and reduced job autonomy. Rather than extending trade union influence in the organisational decision making, partnership is seen as a mechanism that marginalises trade unions (Danford *et al.*, 2005; Kelly, 1996, 2004; Terry, 2003). The third is the “constrained mutuality” thesis which suggests that, while workplace partnership does deliver gains, the balance of advantage favours management and so the gains are not truly “mutual” (Guest and Peccei, 2001; Roche, 2009; Suff and Williams, 2004). An equal balance of mutuality is more likely if certain contextual

conditions such as top management support, efforts by all parties to enhance firm performance, insulation from market pressures, internal institutionalisation of partnership and vertically aligned bundles of mutual gains practices are present (Dobbins and Gunnigle, 2009; Kochan and Rubenstein, 2000; Oxenbridge and Brown, 2002; Roche and Geary, 2006).

### *Process or outcomes?*

Outcomes in the form of mutual gains can, in principle, be used as a measure of the success or “robustness” of partnership arrangements, however, it is recognised that there are difficulties with this focus (Dietz, 2004). The outcomes from partnership are varied and complex, difficult to quantify and subject to perceptions of different stakeholders. Workers, for example, may place different values on outcomes and assessment of the extent of any gains therefore depends on individual perspectives (Geary and Trif, 2011; Johnstone *et al.*, 2009; Roper, 2000). Furthermore, other factors such as the economic environment may influence perceptions of “successes”, for example simply keeping the plant open during tough times may be considered a success. Notwithstanding the difficulties of measuring outcomes of partnership, there are questions around the causal association between partnership and substantive outcomes (Jenkins, 2007; Kelly, 2005; Martinez-Lucio and Stuart, 2004). Thus questions can arise over the extent to which stakeholders view any gains as being a direct result of partnership (Suff and Williams, 2004).

In exploring the links between workplace partnership and mutual gains, we consider it essential to examine the alternative process of collective bargaining in comparable contexts and its impact on substantive outcomes. This is necessary to shed light on this debate and test whether similar substantial mutual gains are possible in the absence of partnership. Roche (2009, p. 14) notes “in examining partnership and its effects, the literature shows less interest in the specific effects of individual practices”. The central notion of workplace partnership revolves around bundles of principles and practices which do not work as effectively alone (Dobbins and Gunnigle, 2009; Guest and Pececi, 2001). Implicit assumptions of this nature mean that the capacity of individual work practices to bring about mutual gains, in the absence of partnership, has rarely been explored. In this approach, we conceptualise AH is a mechanism that may incorporate specific work practices and organisational change that allow for mutual gains outcomes. We examine the capacity of AH to generate mutual gains in different contexts, in both the presence and absence of partnership and ask: Can AH deliver mutual gains and how far does this depend on forms of workplace partnership? By separating AH from the process (partnership or otherwise) through which it is introduced and examining the perceptions of stakeholders with regard to outputs we shed new light on the debate and the role of both AH and partnership in generating mutual gains.

### **AH, workplace partnership and mutual gains**

AH is a practice which sometimes accompanies workplace partnership initiatives and has also been associated with mutual gains (D’Arcy, 1998; Dobbins, 2004, 2007; Frawley, 1998; Higgins, 2005; Irish Productivity Centre, 1998). Although the link between partnership and organisational change has been well documented (Martinez Lucio and Stuart, 2002; Oxenbridge and Brown, 2002; Suff and Williams, 2004), the role of AH in generating mutual gains in cases of workplace partnership has not been

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examined to any great extent. The literature on AH notes its limited adoption despite claims of “win-win” or mutual gains outcomes for workers and management (Arrowsmith, 2007; Bell and Hart, 2003; D’Arcy 1998; Rodriguez, 2003, White, 2010). Despite predictions of widespread take-up of AH in the early 1980s (Mazur, 1995), research from both the UK and Ireland shows limited diffusion of such agreements (Kouzis and Kretsos, 2003; Arrowsmith, 2007; White, 2010). This parallels workplace partnership, in the Irish context, with an apparent mismatch between the capacity of AH systems to generate mutual gains and its limited take-up “on the ground”.

Within AH systems mutual gains are possible from changes to the way working time is organised. AH operate by averaging hours worked across the year rather than the week or month. A yearly salary is paid on a regular basis but hours worked can vary, as required according to the season or demand. Employees work only when they are needed, thereby reducing idle time. Whereas in standard hourly work arrangements, peaks in demand are covered through overtime, or employing temporary workers, AH allows for organisations to closer match working hours to organisational demands (Bell and Hart, 2003; D’Arcy, 1998; Gall, 1996). A key attribute of AH is that overtime is normally eliminated. Typically, a number of “reserve hours” are incorporated into yearly contractual hours with some or all of these not being worked. These are essentially saved hours, which can be used to cover for incidents such as absenteeism or sudden increases in demand. The idea is that workers get paid for these hours, whether all of them are worked or not thus incentivising workers to minimise the use of those hours. It also eliminates any incentive workers may have had to “manufacture” unnecessary overtime and proponents of AH claim it motivates workers to “work smarter rather than harder”.

The claimed benefits of AH for management include an elimination of overtime culture, lower absenteeism, reduced costs and improved productivity and efficiency. For workers, AH are said to deliver gains in the form of a guaranteed, stable salary and higher average hourly pay, improved work-life balance, possibly improved pension and a reduction or elimination of the reliance on overtime (D’Arcy, 1998; Kouzis and Kretsos, 2003; White, 2010). AH appears most suited to certain contexts such as industries with seasonal demand, those with high levels of overtime, continuous process industries and the service sector. There are mixed views, however, in relation to the gains from AH. Many writers emphasise the “win-win” nature of AH agreements (Essery, 2004; King, 2002; Mazur, 1995; Rodriguez 2003). Some emphasise the importance of specific contexts in order for mutual gains to arise (Bell and Hart, 2003; Wallace and White, 2007), while others claim that AH is an initiative which largely reflects a management agenda and, while gains may ensue, the balance of these favours management (Arrowsmith, 2007; Blyton, 1995). Others adopt a pessimistic perspective claiming that workers benefit little from AH agreements. Furthermore, they identify distinct disadvantages to such agreements for workers including reduced discretion over working time, loss of overtime earnings and the unpredictability of reserve hours (Gall, 1996; Gall and Allsop, 2007).

Much of this research is UK based and the specific contexts under which AH operate are important in determining outcomes and balance of any mutual gains. Research on AH in Ireland shows that generally these agreements are found in high-standard, unionised employments (White, 2010). Craft unions in Ireland tend to be positive towards AH while Services Industrial Professional and Technical Union (SIPTU), the largest general union in Ireland recommends that the AH approach should “at least be examined” (Wallace *et al.*, 2004; Naughton, 2000, p. 2). Although, in principle AH can

offer mutual gains, the lack of consensus in the literature on the extent to which workers benefit as well as the rarity of AH means a thorough examination of AH is important. This paper focuses on AH schemes that have been introduced in three companies to shed light on the potential for mutual gains and the significance of the industrial relations processes involved.

### Research design

Johnstone *et al.* (2009) highlight a number of key recommendations for partnership research. Among them is the suggestion for comparative case studies to explore the experiences of partnership in various sectoral contexts; the need to understand more about contemporary worker views and avoid relying on trade unionists as proxies of employee views and to avoid conflating issues of process and outcome. These are the key issues that this research seeks to address. A case study approach is particularly useful to researchers wishing to gain a rich understanding of the context of the research and the processes being enacted (Morris and Wood, 1991). The focus of this paper is on the roles of both AH and workplace partnership in delivering mutual gains in three case study companies in Ireland. The case studies have the following similarities: all operated within process industries and all were highly unionised. All three companies operated AH for both general workers and craft workers. The AH agreements were negotiated at local level between management and trade unions and the operation of the AH systems were similar. Any provisions for paid overtime were eliminated in all three companies when AH was introduced and reserve hours were paid at a premium rate incorporated into salary. All three company agreements included a provision to discount hours on a quarterly basis and a commitment that both management and workers would endeavour to minimise the use of reserve hours. These features are typical of AH agreements in Ireland in the private sector (D'Arcy, 1998; White, 2010).

The case studies were also chosen to explore key differences. The most important difference was whether or not the cases were reported or self-identified as having workplace partnership. As noted earlier the concept of workplace partnership is amorphous and this provides a challenge in studying the concept. Our approach in this regard was to examine partnership as a deliberate process through which management and unions introduced change. In both Aughinish and Natura Foods[1], prior to the introduction of AH, management and unions engaged in formal relationship training with the aim that partnership was to be the “new way” of doing business. Aughinish is widely known as an exemplar partnership case delivering high level mutual gains. In Pharma Physic, no conscious attempt was made by either management or unions to “move” towards partnership. Rather, AH were negotiated as part of a change programme, through collective bargaining. In framing questions, partnership was regarded as a process and distinct from mutual gains which are outcomes. Although relationship training was engaged in by two of the companies in order to build partnership, relationship change itself was conceptualised as an output. This is because, in principle, such training could in terms of results (output) be either a success or failure.

The research was conducted between 2006 and 2010 and the case studies were compiled using primary sources supplemented by secondary information and the company agreements. Summary versions of the case studies are presented here. Initially contacts were made in each company through networking events attended by the researchers. Informal meetings followed with the HR managers in each company to explore some of the key issues and gain access for the research. In total, 16 qualitative,

semi-structured interviews were conducted with management and trade union representatives and shop stewards in the case study companies. Interviewees were chosen on the basis that they would be knowledgeable on the topics of workplace partnership and AH, and typically involved those who had played a significant role in the negotiation of the AH agreement on both management and union sides. Essentially, interviewees were encouraged to “tell the story” of AH in each company with interviewers prompting from a checklist of key issues identified from the literature such as the rationale for the introduction of AH, the role (if any) of workplace partnership and perceptions of workers’ attitudes towards AH. The duration of interviews varied, lasting between 30 minutes and one and a half hours. All interviews were subsequently transcribed and thematically analysed.

A survey of workers was also conducted in each company. This was done in order to address the lacuna in research caused by the neglect of worker opinions (Geary and Trif, 2011; Johnstone *et al.*, 2009; Suff and Williams, 2004). Worker perceptions are important in assessing claims of mutual gains. Questionnaires were piloted with nine shop stewards and five workers and input on the final version of the questionnaire was sought from all interviewees. The self-completion questionnaires were distributed to workers covered by AH through the relevant shop stewards in each company. A total of 618 questionnaires were distributed (across the three companies) and 205 were returned giving an overall response rate of 33 per cent. The response rates for each company were 29 per cent for Aughinish; 37 per cent for Natura Foods and 39 per cent for Pharma Physic. The survey measured worker perceptions and levels of satisfaction across a range of areas, including pay, hours of work, job security and overall opinions on AH. It also assessed worker perceptions of the role of the trade union and relationships between workers and management, including any change in relationships since the introduction of AH and worker perceptions of partnership. All workers had been in the companies, pre and post the change processes. A copy of the questionnaire is available on request.

## The case studies

### *Aughinish*

Aughinish is well known in Irish industrial relations circles as an exemplar partnership company (Dobbins and Gunnigle, 2009; Irish Business and Employers’ Confederation, Skillnets and Irish Congress of Trade Unions, 2000; National Centre for Partnership and Performance, 2002). The plant has recently become part of the Russian United Company Rusal multi-national group (referred to in this paper as Aughinish). The company employs around 450 permanent employees. The vast majority of employees are unionised and the unions on site are the SIPTU, the Technical Engineering and Electrical Union (TEEU) and Amicus (Unite).

In the 1980s industrial relations at Aughinish were characterised by coercive management control, low trust relationships, worker alienation and frequent conflict. As a result, by the early 1990s, the closure of the plant was a real possibility and it became apparent to management and union officials that change was necessary. A radical unilateral overhaul of working arrangements was undertaken in 1993. This involved some 150 voluntary redundancies with workers receiving five weeks’ pay per year of service, plus statutory entitlements. In addition 27 middle and senior management positions were eliminated and the managers made redundant. This was done as part of the decision to implement a flat structure with self-managing teams replacing the former hierarchical system. Although the change was introduced

unilaterally, it was indicated during interviews that management had tacit union support and the change programme was not resisted. Furthermore, management did not see unilateral action as having long-term viability and indicated to workers and the unions their commitment to “doing business in a different way” in future. This was to take the form of workplace partnership.

By the mid-1990s the company decided to seek the introduction of AH in response to the high levels of overtime working and this was specifically designed to reduce costs further. The company had “analysed how we can offer the best possible pay and conditions to all employees while continuing to satisfy the plant requirements within our labour budget” (Aughinish, 1996, p. 4). The proposal involved introducing a high basic salary in return for an agreed number of AH that employees would work. In addition there were between 200 and 250 reserve hours that could be required to be worked but it was specifically agreed that “management and work teams will endeavour to minimise the use of reserve hours while ensuring the plant needs are adequately met” (Aughinish, 1996, p. 65).

As part of the “new way of doing business” AH could only be introduced with the full involvement of the unions and employees. In preparation the company and unions engaged in training on interest-based bargaining (IBB) with a focus on “Getting to Yes” by Fisher and Ury (1983). This led to AH being introduced simultaneously with the development of workplace partnership. The trade unions and their members had considerable input to the design of the AH system and formal negotiations were characterised by IBB. Consistent with a mutual gains approach, a joint monitoring and implementation group of workers and management representatives was formed and this proved very important. “Both sides got it wrong at times but we worked together on issues as they arose and sorted them out before they became major problems” (Management Informant A). Despite this collaborative approach considerable reservations continued to exist among employees and it took two years for the process of introducing AH to reach completion. AH were introduced for craft workers in 1996 and for general operatives in 1997.

Interviewees saw considerable mutual gains arising from AH. Union representatives identified a stable salary which, although lower than the average of previous earnings, did not involve overtime working and was substantially higher than the previous average basic pay. The defined benefit pension scheme was amended so that it was now based on the new enhanced salary and a sick pay scheme was introduced. The major benefit to workers was seen as the low percentage (around 5-8 per cent) of reserve hours worked. The low use of reserve hours was possible due to preventive maintenance, workers identifying and eliminating some previous causes of overtime, reduced absenteeism, no worker resistance to the use contractors, “huge cooperation within areas” and the high level of autonomy given to the self-managed teams who regulated working of reserve hours themselves. Management informants identified the following gains: greater predictability and control of labour costs, a decline in absenteeism due to team self-regulating and limiting call-ins, greater flexibility and in general more efficiency and fewer plant shut-downs.

Some gains were equally valued by both sides. There was a dramatic drop in disciplinary action and grievances. There was a reduction of formal grievances from an average of 150 per year to only two to three per year, due in part to elimination of overtime grievances. A TEEU official commenting on reduced grievances said “I remember phoning the shop stewards below [...] were they still alive there?” Both union and management informants indicated they valued the collaborative and



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non-adversarial problem solving approach to issues which characterised what they saw as a highly developed level of partnership. At one point when a dispute was referred to the Labour Court, a management interviewee noted “we’d become so used to partnership we found it very difficult to go back to ‘sitting across the table’ from each other”.

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### *Sustainability of gains*

For many years partnership and AH were seen by interviewees as mutually self-reinforcing arrangements. However, in 2008 the company experienced difficulty from a dramatic drop in demand for aluminium as result of the international recession. This led to short-time working. At the behest of the new Russian owners it also saw management increasing the proportion of reserve hours that were worked. Management and union informants indicated that this had led to a negative reaction from employees. Thus it was claimed by management that the worker survey which was conducted in late 2009 would likely elicit less positive responses than if it had been conducted prior to the crisis. After the survey was conducted, demand recovered and workers resumed full-time working. While there is no base line data that would establish the precise effect the increase in use of reserve hours had on workers’ views it is clear from qualitative comments below that it had a negative impact but nonetheless the overriding evaluation of AH and partnership still remained positive.

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### **Natura Foods**

Natura Foods was established in 1974 and following a number of takeovers is now a subsidiary of a large multinational pharmaceutical company. It is an export-orientated company which employs almost 600 people. The main unions on site are SIPTU, TEEU and Amicus (Unite). During the 1970s and 1980s, Natura Foods had what management described as “very poor, adversarial industrial relations” illustrated by a “two-way lack of trust between management and employees, lack of accountability, significant demarcation and restrictive practices” (Management Informant B). There was extremely high use of overtime which, in addition to being costly caused issues around inflexibility and control.

During the late 1990s there were changes at senior management level with a new managing director appointed in 2000 who “saw that change was needed” (Management Informant, B). A further driver of change was the onset of internal competition from another subsidiary of the Natura Foods group which management perceived as a major threat. “There was a new plant being built in Singapore at the time which had lower costs, zero per cent corporate tax, lower ingredient costs and closer to the biggest core market. All of a sudden we went from being two and a half times as big as everybody else to being just a little bit bigger than one other plant” (Management Informant B).

As a result of these factors management sought agreement on a change programme called the “Programme for Change” (PFC) with all changes negotiated with the various union groups. Two key features of the PFC were a proposal to introduce AH and the development of improved relationships. In addition, the PFC involved a range of other measures including 40 redundancies, the introduction of teamworking and greater flexibility. The programme took some five years to negotiate and implement across the plant with AH being introduced for different groups of workers from 2004. The agreement on AH included provision for 200 reserve hours, which have been kept to a minimum. As in Aughinish, extensive relationship training was undertaken in order to move towards a more collaborative way of dealing with issues in what was viewed as a “partnership” approach.

The evidence overall from both management and trade union interviewees is that AH and the accompanying changes in the PFC have worked well and delivered mutual gains. The gains which were identified by informants are similar to those in Aughinish. For employees these are a high and stable salary and shorter hours. The latter is due to the elimination of overtime and only a small percentage of reserve hours being worked. For management the gains are the elimination of overtime, increased output without accompanying cost increases, the use of preventive maintenance and increased flexibility. The various measures implemented in the PFC have made the plant highly productive. A management informant remarked “productivity compared to the other big plants [...] our productivity here per person is probably twice [...] we’re probably around 240,000 tonnes of product per employee and they’re somewhere around 110 to 125 in any other plant you choose”. As in Aughinish, there was a much reduced incidence of grievances and discipline which both management and unions in Natura Foods saw as beneficial.

While the gains from the PFC have been enduring, the partnership has not been sustained at the same level. The company still espouses a commitment to a partnership process; particularly those management and union representatives involved in the PFC. Some management and union informants saw a weakened level of partnership as continuing to exist. “I would say it’s probably not as good as we want it to be, it has its ups and downs like any partnership, but it’s light years from where we were [previous adversarial relationships]” (Management Informant C). “It only works to an extent, there’s still stuff out there that in my view, the company are still not fully comfortable with doing the whole partnership thing” (Unite Shop Steward B). Other interviewees, notably union informants, did not recognise partnership as being in any way evident. “Personally I don’t see it. I see this [the relationship training] was a means to an end [...] I do not see partnership as a viable proposition at all. I don’t believe the management have any interest in us being partners with them” (SIPTU Shop Steward A). “It’s not partnership, certainly not” (SIPTU Shop Steward B). The main reason given for these negative perceptions related to changes in management and subsequently a lack of understanding about the “spirit of the agreement” on managements’ side, which could only be understood by those involved in negotiation of the change process.

### **Pharma Physic**

Pharma Physic is a pharmaceutical company established in 1980 and employs approximately 100 workers, who are unionised (SIPTU and the TEEU). Up to the late 1990s the company experienced growing sales every year since its establishment and as a result always struggled to meet sales targets thus operating in a very high overtime-based environment. Historically, the relationship between management and workers was described as poor. A management informant described the working environment as “combative” and very restrictive in terms of demarcation, which he said was “probably due to bad management in a way” and “[there was a] culture around pay for change” (Management Informant D).

The immediate reason for restructuring was a sudden financial crisis precipitated by a drop in demand for the product of between 20 and 30 per cent. This created what management described as a “burning platform” due to increased competition combined with a failed attempt to expand into the US market. “It was a bit of a disaster [...] we had to cut back to three shifts. So that meant losing large numbers of people (redundancies) and so what we decided to do was not just to cut the numbers but to re-organise, we would change our system of work and bring in an AH system”

(Management Informant D). The company sought redundancies, pay reductions and the introduction of AH working, including 210 reserve hours in 2001. There was no attempt to manage issues through partnership and no relationship training was undertaken. The changes sought by management were addressed through collective bargaining, as had always been the case in the company. While this process is commonly described as adversarial or/and distributive the reality of the process in Pharma Physic is more nuanced. First, agreement was reached on substantial wage reductions involving, according to management, a fall in earnings from around €100,000 to around €50,000. Employees were compensated by a buyout of the value of the loss in earnings based on an analogue of two years earnings loss. Second, management were able to dramatically reduce numbers from 160 to 95 – a much higher proportionate reduction than in either of the other two case studies. These were on a voluntary basis with enhanced severance terms – seven and a half weeks pay per year of service (including statutory entitlements). Third, while AH came with pay reductions, the two unions involved saw it as ensuring stable earnings and protecting the remaining jobs. The TEEU official noted “our interest was in protecting our members and there was an acceptance [...] after a lot of debate [...] this [AH] is possibly the best way to secure the jobs and secure the earnings”. The SIPTU official claimed workers were initially cynical towards AH and had “quite a lot of questions about it. When we put the whole package together, it was very much an overwhelming majority I would say, if not unanimous, that it would be brought in” (SIPTU official). In effect, the prevention of further job losses was perceived as an employee gain.

There was also a provision in the agreement, that should demand for the product subsequently increase and production levels recover, this would be addressed through a productivity scheme. Around a year after the agreement was introduced, demand increased and the productivity clause was triggered. This involved “a percentage (increase in pay) [...] and we went all the way to 90 tonnes [...] from 73 to 90 tonnes [per annum] without any extra people, or extra shifts, or extra time, just by pushing harder and getting the stuff out the door and having a productivity element to their pay” (Management Informant D). In monetary terms workers gained “about two to four thousand (euros) a year” and this was subsequently incorporated into basic pay when the company invested in new technology to enable the increased output of 90 tonnes per year.

The processes involved in the negotiation of this agreement were developed over the last 40 years through collective bargaining and productivity agreements before the term workplace partnership was even coined and is typical of what is recognised as adversarial bargaining in an Irish context. However, the outcome was not just a win-lose and the agreement involved a number of trade-offs between the parties as outlined above. This is typical of “mixed motive” bargaining or a mix of integrative and distributive bargaining involving “creating and claiming value” (Lewicki *et al.*, 2003).

Among the benefits identified by management from the change process were lower operating costs, improved productivity, greater flexibility, a better industrial relations atmosphere, improved personal relationships and decreased absenteeism (from an average of 6.3 per cent). Of major importance for management was the speed with which agreement was reached. The new system was introduced within three months. “We moved fast, we had to move fast so we picked a time and we picked a day and then we started the discussions and the negotiations and said – ‘we are reorganising [...] and it has to be done by then’” (Management Informant D). This speed contrasts with the extremely long time for the negotiation of AH in both Aughinish and Natura Foods and hints at one possible advantage of traditional collective bargaining over partnership.

For workers, job security has been delivered. There have been no further redundancies and turnover has been quite low. In addition, both management and union sources suggested that workers have come to appreciate the improved work-life balance that has resulted from working AH. A trade union official described how work-life balance is not something workers wish to trade for loss of earnings, however, when viewed in the context of AH he maintained a worker's view is "I've secured my earnings so yes work-life balance is something we should look at" (TEEU Official A). Relationships in Pharma Physic have also improved with management noting "it's much less combative, there's still a bit of 'us and them' but in general it's far, far better. We don't have formal partnership but we do involve them an awful lot and we communicate a lot more than we used to".

### **Worker survey findings**

The case studies provide examples of change being brought about with and without "workplace partnership". Interviews with management, unions and shop stewards in all three companies show outcomes from AH were perceived as being very beneficial and delivered mutual gains. These findings are based on representative opinion and as such do not directly establish the views of workers. The worker survey aims to provide direct worker perceptions of both AH and partnership. The findings from the worker survey in all three companies are combined here to allow for a comparative analysis.

#### *Gains from AH*

The results confirmed the perceptions advanced by representatives of management and unions that AH was seen as delivering mutual gains. Asked "If a vote on AH, as it is, in your company were held today, how would you vote?" an overwhelming majority (84 per cent) of workers across all three companies indicated they would vote to "keep AH". When asked "What is your main reason for the above answer?" workers cited shorter hours, better work-life balance, stability of earnings and less reliance on overtime as key reasons for wanting to "keep AH". The following comments were typical:

AH allows you to plan your time off, gives you a steady weekly wage and not depend on overtime to survive.

As someone who worked a lot of overtime in the old days I find I now have a lot more free time without losing too much money.

Thus there is a strong congruence between the qualitative interviews and survey results with AH being seen as delivering substantial benefits. However, there were differences in satisfaction levels between the three companies. Respondents in Natura Foods were most favourably disposed with 93 per cent saying they would vote for retention of AH and 87 per cent in Pharma Physic. In Aughinish, the widely regarded exemplar company, the figure was lower with 72 per cent saying they would vote for its retention. Worker comments in the survey confirmed managements' perception that the results of the survey would be affected by the increased use of reserve hours:

If you asked me to fill out this form one to two years ago I would be a lot different. I was very satisfied with it [AH] then. Now management are not abiding by the spirit of the agreement and it is turning me against it.

*Relationship change*

The aim of improved relationships is seen as a key objective of partnership arrangements. As noted previously, we conceptualise improved relationships as an output, which may be as a result of either a partnership process or AH. Employees were asked: "As a result of AH, have relations between workers and management in your company changed?". A majority of employees perceived a change in relationships in all three companies, with the strongest effect being noted in Aughinish (Pharma Physic 68.8 per cent, Natura Foods 64 per cent and Aughinish 86 per cent). Those who answered "yes", were further asked "in what way have relations changed?" In two of the companies a majority of respondents considered that relations had improved. In the third company, Aughinish, opinion was almost equally divided with 52 per cent considering relations were worse or somewhat worse than before and 48 per cent considering they were better or much better (Table I).

This finding appears surprising at first as Aughinish, the organisation which has previously been identified as an exemplar of partnership, was perceived by workers as having the most negative assessment of the changes to relationships. This is explained by a perception among respondents that the recent increase in the use of reserve hours was a breach of the spirit of the agreement and thus a diminution of gains from AH. This is exemplified by the following qualitative responses in the worker survey:

[AH] worked fine until 2009 [...] [management] wants more in my opinion and greatly affects trust/partnership/teamwork all which seemed to have been better prior to 2009.

At the moment the company want us to work reserve hours to justify paying us for them. This is mean spirited and not in line with the ethos of the agreement – win-win.

*Partnership and relationships*

In order to explore the issue of partnership and relationships further (in all three companies), workers were asked for their opinions of the effect AH has on relationships between management and unions in their respective companies.

The results in Table II indicate a similar percentage of workers in the three companies believed that AH "promotes a partnership relationship between the two" (27.8 per cent in Pharma Physic, 25 per cent in Natura Foods and 31.6 per cent of workers in Aughinish). Aughinish has the highest percentage of workers from the three companies that believe AH promotes partnership and this indicates a continuing support for workplace partnership by some, despite recent difficulties. However, in contrast, Aughinish also had by far the highest proportion of respondents (38 per cent) claiming that the relationship change "causes unions to be too much on managements' side". This again is indicative of the effect the diminution of gains from AH had on worker perceptions

Relations are	Pharma Physic	Natura Foods	Aughinish
"Much better than they were before"	18.2%	11.8%	19%
"Somewhat better than they were before"	63.6%	74.5%	28.6%
"Somewhat worse than they were before"	18.2%	13.7%	30.2%
"Much worse than they were before"	0%	0%	22.2%
Number of responses	11	51	63

**Note:** Results in Aughinish are statistically significant at the 0.01 level compared to Natura Foods using Anova test (Bonferoni)

**Table I.**  
In what way have  
relations changed?

and the perceived failure of the trade union in this regard to protect worker interests. The percentage of workers in Pharma Physic who believed a partnership relationship was promoted by AH is remarkable, given the absence of any formal partnership there. Although results in Pharma Physic are limited somewhat by the number of responses, this result indicates that improved relations are not necessarily just a by-product of formal partnership but can arise from mutual gains generated from AH (Table III).

**Table II.**  
In your opinion, what effect does the existence of AH have on relationships between management and unions in this company?

	Pharma Physic	Natura Foods	Aughinish
Promotes a partnership relationship between the two	27.8%	25%	31.6%
Causes greater conflict/problems between the two	16.7%	10.9%	11.4%
Causes less conflict/problems between the two but not partnership	33.3%	34.8%	10.1%
Causes unions to be too much on managements' side	0%	4.3%	38%
Has no effect on relationships between the two	11.1%	18.5%	7.6%
Other	11.1%	6.5%	1.3%
Number of responses	18	92	79

**Note:** This question allowed for multiple responses

**Table III.**  
Case studies summary

	Aughinish	Natura Foods	Pharma Physic
Company context and industrial relations	Continuous process environment, high overtime, adversarial IR	Continuous process environment, high overtime, adversarial IR	Continuous process environment, high overtime, adversarial IR
Impetus for change	Crisis, plant on brink of closure, new management	Competitive threat, new management	Crisis, plant on brink of closure
Process of introducing AH	Initially unilateral management change. Relationship training, move towards partnership	Relationship training, move towards partnership	No change in company's collective bargaining process
Accompanying changes	Redundancies, flatter organisation structure, autonomous teamworking	Redundancies, teamworking, flexibility	Redundancies, pay reductions, productivity agreement
Outcomes	Mutual gains and improved relationships initially (and for quite some time). Subsequent decline in gains for workers	Mutual gains and improved relationships	Mutual gains and improved relationships
Management views	Mostly positive with regard both AH and partnership	Positive with regard to AH, mixed in relation to partnership	Positive with regard to AH and improved relationships
Trade union views	Mostly positive with regard both AH and partnership	Positive with regard to AH, mixed in relation to partnership	Positive with regard to AH and improved relationships
Worker views	Initially positive with regard both AH and partnership. Subsequently mixed in relation to both	Significantly positive towards AH, mixed in relation to partnership	Significantly positive towards AH and improved relationships

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## Discussion and conclusion

Returning to our key research questions, we asked:

*RQ1.* Can AH deliver mutual gains and to what extent does this depend on workplace partnership?

Our findings show that individual cases are complex and different stakeholders' perceptions of partnership, AH and mutual gains can be different. The case studies and survey results indicate greater agreement on outcomes (mutual gains) than process (partnership). Representative views on AH are largely consistent across management, union officials and shop stewards. While there are some differences of opinions on AH among workers, what is most notable is the high approval ratings that it gets across all informants and survey respondents in relation to gains. Thus there is no support for the pessimistic perspective of AH in these cases and large support for the optimistic or guiding principles perspective identified earlier in the literature. There is some limited support for constrained mutuality thesis in the developments in Aughinish where some workers perceive the balance of gains shifting towards management but it is important to note that there is still substantial majority support for AH.

An important point in relation to gains from AH for workers relates to the use of reserve hours. If reserve hour use is high, then the gain of increased leisure time does not materialise and instead workers are at a disadvantage due to working hours without overtime payment. However, in the three cases both workers and management agreed in advance to strive to limit the use of reserve hours. Of course a major gain across all three cases was survival of the company and minimising job losses, particularly in Aughinish and Pharma Physic where closure was a real threat. All three cases indicate a perceived better industrial relations environment and improved productivity by management and unions. These are gains which are often credited to workplace partnership (Kochan and Osterman, 1994; Guest and Peccei, 2001). However, we found these to exist in all three cases, despite variations in stakeholders' perceptions of workplace partnership.

### *Workplace partnership*

While AH were generally very positively perceived, the results in relation to partnership are distinctly more mixed. These range from strong support of workplace partnership by some (particularly those involved in initiating partnership) to negative perceptions of partnership by others. In Aughinish declining worker benefits meant workers saw a decline in workplace partnership whereas in Pharma Physic, workers attributed gains to workplace partnership, despite the absence of any formal approach. This highlights the problematic nature of workplace partnership and emphasises the inability to distinguish between processes and outcomes and the importance of stakeholders' perceptions. One union interviewee noted "I don't think partnership or relationship training is a pre-requisite to the successful introduction of AH but it can help" (TEEU Official B).

Relationship training can help build trust between management and unions and encourage them to seek better ways of working in the pursuit of mutual gains. This helped introduce AH and accompanying changes in Aughinish and Natura Foods through the label of workplace partnership. However, AH alone provides rational incentives for workers to cooperate with management to find more efficient ways of working. There are real gains from AH that require effort from both parties to sustain. It is in workers' interests, for example to find innovative ways of improving productivity while reducing hours at work and in managements' interest to allow them the autonomy to do so. AH allows for the elimination of overtime, which reduces

grievances and in turn leads to improved relationships. These incentives are particularly strong in crisis situations such as in Aughinish and Pharma Physic where the alternatives are bleak. Where there are no rational incentives or concrete means of creating mutual gains, then we would argue partnership is meaningless, as highlighted particularly well by one trade union official:

Look at all the models [of partnership] that were held up; they're all in bits, except for Aughinish because it has the driver [AH] (TEEU Official A).

As previously noted, the lack of continuing management commitment is often identified as a reason for the failure of partnership initiatives (Kochan and Osterman, 1994) and this was the case in Natura Foods. However, there may be rational reasons why such support can be lacking where changes to work organisation have seen mutual gains and improved relations. New managers may see little sense putting concerted effort into fostering partnership while to those involved in developing partnership and promoting change things can look quite different – they are more likely to value the process and see a direct link with outcomes of mutual gains – again perceptions are highly significant. As such, workplace partnership may only be relevant to participant stakeholders, as underpinning or sustaining their efforts at integrative bargaining or mutual gains.

The three comparative case studies indicate that AH can generate mutual gains through integrative or mixed motive bargaining regardless of whether this is perceived as workplace partnership or not. Thus the major problem with the partnership debate, that of distinguishing between what is or is not partnership is further highlighted. By “unpicking” the bundles of work practices associated with workplace partnership and examining the capacity of AH in generating mutual gains, through different industrial relations processes we show further evidence of the intellectual and practical limitations of the concept of workplace partnership. The case studies highlight two key points. First, is the importance of AH, not partnership, as central in the creation of mutual gains. Second is that stakeholders’ support for AH and partnership is largely determined by the outcomes, namely the existence of mutual gains.

This research provides an addition to the limited research on worker perspectives on AH and has important practical implications. In this regard the findings support suggestions by Cutcher-Gershenfeld *et al.* (2001, p. 16) and Miller *et al.* (2010) that the diffusion of IBB is likely to be dependent on delivering on “its promise of mutual gains” and that IBB is poorly perceived where it produces less favourable settlements. The positive worker perspective in our research can be considered as somewhat exceptional in that high levels of mutual gains were achieved but these were largely due to AH not partnership. This of itself suggests a reason for the failure of Irish workplace partnership, despite national institutional support. Partnership and AH may work well in tandem but AH is only suited to certain limited situations where overtime can be eliminated – in effect it is a successful but limited mechanism. Without a more widely applicable mechanism to generate mutual gains partnership has floundered. Thus the implications for practice in this paper are the limited possibilities for AH but the importance of trade union involvement in its negotiation, where it is being considered. For formal workplace partnership the implications are somewhat pessimistic. The research points to the need for a driver to deliver mutual gains and provide continuing support if partnership is to be sustained although even then that is not guaranteed as the Natura case demonstrates. Where no “driver” exists to produce mutual



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gains then partnership may flounder. While pessimistic this reflects the reality of the Irish experience of partnership. In conclusion, we suggest that future research would benefit from longitudinal case study analysis on the permanency of mutual gains and also an assessment of the implications of changes in the economic environment on the capacity of AH to generate mutual gains.

AH, workplace  
partnership  
and mutual  
gains

## Note

1. Natura Foods and Pharma Physic are pseudonyms. Aughinish is used with the permission of the company as this case is widely quoted in the literature.

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