
Trade union-based workplace learning: a case study in workplace reorganization and worker knowledge production

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Abstract

Presents a case study on union-based research and education activity generated in response to restructuring in the Canadian telecommunications industry and workplace reorganization. Findings suggest that an education/research/policy dynamic rooted in the union local helps to build the potential for workplace democracy and organizational capacity in the labour movement.

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Introduction

Creating the appropriate role for the union is like a new work system itself. Union leaders need to be prepared to deal with all facets of the work organization, including some aspects that could once be written off under the concept of “management rights” (Martin, 1993, p. 2).

The above quote suggests that the process of workers finding an appropriate role in workplace reorganization should be understood as a new form of work, hence a new form of social participation and learning. To achieve these types of shifts in work and learning, in the context of a participatory, living “union agenda”, requires a whole range of underlying activities including union courses, informal learning, policy development as well as local labour research. For the labour movement, understanding these activities may be part of developing strategic capacity for the representation of class interests in attempts to achieve economic democracy.

This article presents an expanded model of union education in relation to the learning and action required to mediate workplace change. It is a model of workplace learning that begins from a labour perspective and explores the role of union learning, research and policy as a means of building the collective capacity to challenge the agenda of workplace change. Workplace learning, from the standpoint of workers, is not limited to the goals of profitability. It is a model of learning that includes productivity and efficiency but puts the direct, social needs of the majority of workplace participants (i.e. workers) first: a concern for quality jobs, participatory control over the organization of work and a role in the control of change initiatives. At its broadest level I discuss the complex mechanics of an attempt by workers to encroach upon “management rights” and democratize the planning functions of the labour process.

Specifically, I provide an outline of a case study in which we see the attempt of one union local to cope with the introduction of a specific workplace reorganization initiative in the Canadian telecommunications industry

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during the period 1993 to 1997. This period marks a time of intense restructuring and organizational change and within it we see how workers attempted to negotiate the currents of this change through the development of a “union agenda” powered by the dynamics of education, research and policy development. The case study provides a glimpse of the way that these dynamics can contribute to a participatory unionism at the local level. It addresses the basic elements of an expansive programme of learning that cuts across individuals, groups and organizational levels from the workplace, community and union local to the influences of the parent company, the national union structure and advanced capitalism. It addresses the requirements of such a programme and the challenges it faces. It shows how studies of workplace learning need not be limited to existing needs of production. And, it shows that trade union mediated learning need not be limited to simply training stewards and collective bargaining, but can be a tool that fuels ongoing participation in the shaping of both a union agenda and an alternative vision of work and learning.

The union in the case study is the Communications, Energy and Paperworkers (CEP) Local 6 which, at the time, represented approximately 250 workers employed by Northern Telephone Limited (NTL). Two of the key figures in the study, D’Arcy Martin and Jorge Garcia-Orgales[1], were in fact co-investigators on this project and informed the research in such a way as to provide a rare “insider’s view” of the dynamics of union learning. Formally, the analysis involved looking at union educational documents (curriculum, course articles, etc.); qualitative and quantitative research carried out at the union local; a range of union policies and policy statements (union conference and convention documents, policy statements, etc.); as well as selected memoranda, letters and personal papers from several of those most intimately involved. The analysis also draws on interviews with Local 6 union leadership, CEP staff and education representatives, and labour researchers working in the telecommunications industry under a government-funded research initiative which operated at the time, called the technology adjustment research program (TARP).

From the beginning, it was felt that local leadership and rank-and-file workers, with suitable resources, could direct their own educational and research practice to produce progressive forms of engagement over the issues of workplace reorganization. The research was premised on the notion that union education could not be understood simply in terms of the union courses delivered. Instead, union education had to include a broader idea of learning that was embedded in everyday action and situated, organizational life of members. The Local 6 situation specifically suggested the notion of a core dialectic in which education and research played a central role in everyday learning and possibility for organized direct action. In the case study this is referred to as the “education as research/research as education” dynamic[2]. It was a dynamic that union president Donna Lazure described well:

It was just a circle, a process. You had the idea. You found out everything you could, so that’s the research. You created the courses – so that’s to do it, to go with it. But then you analyzed what you did. You couldn’t just stop there and you did it all over again. Was that effective? Did that work? What else do you have to do? Uh, we gotta go back and learn this and this. So really it is just constant (interview with Donna Lazure, October 1997).

It was a dynamic that both encouraged and required high levels of participatory democracy within the union. However, this dynamic did not exist in a vacuum. The late 1980s and 1990s in Canada saw harsh political economic forces at work. These forces shaped activities in the workplace, in the local community, in the union hall, as well as at the regional and national levels of the labour movement. As themes began to emerge from the data, it became clear that to understand union education in an expanded way required thinking in terms of an interactive triangular relationship that featured education and, research as well as union policy/politics. Together these elements form the guiding threads to the case study project and the discussion below.

Besides simply providing an account of union-based workplace learning that continues to be invisible to the majority of researchers in the field, the contribution that this case study makes to trade union studies and workplace learning literature involves the recognition that complex forms of institutional relations and struggle within capitalism can become

understandable as a form of collective human agency when viewed through the lenses of “education” and “research”. Fully understanding the patterns of participation that emerged required a conceptual approach that was sensitive to formal as well as informal and tacit processes, the mediation of participation *vis-à-vis* the production of the union’s own knowledge and so on. It required an approach that saw the relationship between patterns of participation in multiple, overlapping spheres of activity, and recognized the unique working-class standpoints in these spheres. Specifically, the Local 6 case study required a perspective on learning that could allow us to conceptualize the way different spheres of activity (education, research, policy creation at the local, regional and national level, and so on) have their own unique terms of reference and logic yet remain intertwined. Situating the activity broadly in political-economic terms, for example by noting the context of de-regulation in the Canadian telecommunications industry in the 1990s, is also an essential component of the learning model. And finally, an approach to human activity suitable for an expansive view of learning in the labour movement should also explain the role played by “mediating tools” that workers both import and develop themselves. In this case study, these tools could be anything from course curriculum and policy statements, to the key phrases or oral artifacts (that play such an important role in the predominantly oral culture of the labour movement) which reverberate through the action and help shape it[3].

The economic context of labour education, research and policy at CEP Local 6

Canadian telecommunications as an industry in the 1990s was undergoing massive change. According to Mosco (1994), a combination of technological change and aggressive attempts by companies to loosen public controls initiated a period of convergence in which sectoral divisions were de-stabilized. Newspaper, broadcasting, cable and internet companies became more integrated, and the situation for communication workers became increasingly difficult. The result was the reorganization and intensification of work through changes in job classifications as well

as the downsizing of traditional occupational groups which accounted for a sizeable proportion of CEP Local 6’s membership.

Another factor that would prove to be important for the education/research/policy dimensions of union learning at CEP Local 6 involved the linkages between NTL and the much larger Bell Canada (one of Canada’s largest telecommunications companies). As the sole owners of NTL, during the 1990s Bell Canada sought to integrate its labour-relations and workplace reorganization strategies across the two companies in such a way as to use NTL as a testing ground for new initiatives[4]. Following this lead, the representatives at several levels of the union in fact began to think in similar terms. Though it was not formally stated, it became clear to the union that Local 6 was to become an important “laboratory”, as well as an intense period of learning for the union. For Local 6, this meant little until in March, 1992 Bell inserted a new chairman of the board at NTL who would push for a workplace reorganization strategy that would open the door for a challenging and controversial period of union policy and practice through the mid-1990s[5].

Education, research and policy at CEP Local 6 (1993-1997)

The year 1993 could be described as a year of transition for Local 6 in a number of ways. It marked a transition to a deeper form of participation in the continuous improvement initiative on workplace reorganization, and the establishment of an education as research/research as education dynamic which helped produce a living, participatory “union agenda” for the local’s forthcoming work. With de-regulation on the horizon, major gains were made by the union within the process during 1993 and the union began to take charge of its own education development. The union won important victories in terms of full-time jobs as well as job re-classification. Relations with management were positive to the point that the company president made what was to become an important statement in this phase. His attitude toward the union was changing and he now stated we would not merely tolerate the union, but in fact begin to learn from it[6].

Up to the fall of 1993 the learning the union had done had been largely isolated, self-directed and informal and, in several cases, company-led[7]. For example, Local 6 leadership attended educational conferences such as The Ecology of Work event which was both sponsored by NTL and dominated by managers and managerial consultants[8]. The programming at the event was rooted in managerial interests and perspectives. Until 1993 there had been only preliminary consideration of developing a more conscious, local educational program rooted in their own "research" and formal knowledge production, and critical understanding of union perspectives on workplace change were limited to the local union leadership. However, the local was beginning to make progress towards critical participation. In October of 1993 the educational representative for the Ontario region of the union, D'Arcy Martin, along with Garcia-Orgales (an independent labour researcher at the time) and national representative John Edwards, were sent to deliver a union-based course on workplace reorganization to Local 6 members called "Facing management". This same year the local union had started to organize its own "parallel" strategic planning which included the development and use of an important tool called the "Code of Conduct" for union members participating in the work reorganization processes:

Code of Conduct: CEP Local 6 Union Reps Workplace Reorganization (TQM) committees

- 1 Form a union parallel workplace reorganization (TQM) committee.
- 2 Plan your participation in workplace reorganization (TQM) meeting beforehand.
- 3 Participate in workplace reorganization (TQM) sessions as a union member, not as individual workers.
- 4 Remember you are elected representative and you are responsible for your electorate.
- 5 Always gather information, ask questions and explore management positions and report these ideas to the union workplace reorganization (TQM) parallel strategy structure.
- 6 Never volunteer responses until a thorough discussion with the union team and the union workplace reorganization (TQM) committee has occurred.
- 7 Never agree to violate the collective agreement.
- 8 Never attack another union member in the workplace reorganization (TQM) committee meetings.
- 9 Never discuss union business in the workplace reorganization (TQM) team meetings.

- 10 Never undermine the grievance procedure.
- 11 Only participate in workplace reorganization (TQM) through the union.
- 12 Always aim to improve or protect the standards and/or quality of life for all members.
- 13 Make sure all aspects of the resolutions are analyzed with all clauses of the collective agreement.
- 14 Make sure new company policies, strategies and procedures do not cause excessive stress on workers.
- 15 Secure workplace reorganization (TQM) gains in the collective agreement.
- 16 Protect worker's rights in the agreement.
- 17 Insist on union representation at all workplace reorganization (TQM) information sessions.

The code document laid out a variety of creative guidelines for members and proved extremely valuable. Another key action to emerge from the course meetings was the launch of a union newsletter specifically aimed at facilitating communication and an organized union voice in the local. It was also in the fall of 1993 that CEP TARP researcher Jorge Garcia-Orgales began to use research, hand-in-hand with education and policy development, to support the creation of the capacity of the local to participate in the workplace reorganization process. Research was used in concert with the educational process to produce a "real-time" and highly participatory form of union learning and action. In September 1993, Local 6's staff representative John Edwards released a brief but important statement that would reverberate through the learning, planning and discussion through the entire period. It was entitled "The challenge before us", and in it Edwards suggests that building a union agenda on workplace learning requires more than simply having a voice, but rather includes major structural changes in the nature of control in the workplace:

As unionists, we have always struggled for a voice. If we have asked for nothing else, we have asked to be heard, to be part of the process. . . . Until now, we have been pounding at the door. Asking for an audience. . . . Well, the door appears to be open right now at Northern Telephone Limited. Are we afraid to enter? Are we afraid the door will close and trap us inside? What is our obligation? We should do more than just barge in a speak our minds. We should first remove the wall that holds the door in place. Only then can we guarantee that never again will the door be closed, trapping us on either side. If this is our objective, we must think carefully and respectfully together about how to reach it (John Edwards, national representative).

The efforts at the local built upon the message that emerged from a key union conference in May 1994. The experiences and momentum that was building at both Local 6 and the CEP locals at Bell Canada played an important role in formalizing this policy that would in turn guide future educational/research work at Local 6. This policy gave voice to the notion of critical, negotiated model of engagement with management, and depended on a mobilized and highly informed membership. Intensive planning and consultation was to take place through to the fall of 1994 with Martin, Garcia-Orgales, replacement national representative Vic Morden and Local 6 representatives, which culminated in the delivery of the innovative “Stress and workplace reorganization” course[9]. A particularly useful tool developed for this course was something Martin and Garcia-Orgales called the “smoke alarms” activity.

This was a tool designed to draw both education and research elements into a participatory activity amongst members. The activity allowed members to evaluate and chart future union responses in terms of changes in the telecommunications industry, activism in the surrounding local community, relations with NTL management, as well as in terms of development of the local, regional and national union. In this and earlier workplace reorganization courses at Local 6, Martin and Garcia-Orgales would present a tool like the “smoke alarms” activity, and overnight Garcia-Orgales would work up frequency counts and run cross-tabulations. Martin comments on the practice:

What Jorge would do is he would do that stuff and then he would take it to cross-tabs. How many who think we're in bad shape, also think that the members are apathetic? Or, how many people who said in their work area [workplace reorganization] is going slower than in other work areas, also feel that women are being left out? Cross tabulations. And that's more like genuine research So it's where you go from participatory education over to systematic research based on the participant's opinions (interview with D'Arcy Martin, July 2000).

Garcia-Orgales describes how he would use a “convention floor”/plenary style collective interpretation method that included members engaging in group discussions and drawing conclusions on the figures posted in front of them:

[Members] come up with a bunch of ideas or conclusions about why those numbers were there. From there we would move on to what we have to do as a union. “We know now that people are feeling this way, and saying this and doing that. We have an idea of the why because we know the workplace, but for us as local union leaders it is not enough to just know. We have to respond to it.” And that was the thing that was done collectively (interview with Garcia-Orgales, July 2000).

Not only did this provide powerful action outcomes from the sessions, it also contributed to the development of a deeper understanding of research amongst workers, most of whom were getting their first experience of being in control of the numbers and charts that were used so often against them by management.

The other core research/educational activity at Local 6 was initiated in March of 1994 when Garcia-Orgales accompanied Local 6 leadership on the first of several research-based “road-trips” during which the union leadership would visit each of the four (relatively dispersed) worksites within Local 6 (New Liskeard, Timmins, Kapuskasing, and Kirkland Lake) over the course of an intensive three days and two nights of travel and meetings. By the end of 1994, a survey had been developed and administered, and a few months later the results were presented back to the membership. The research presentation, entitled “Work changes: Northern Telephone – a good place to work” reported that rank-and-file membership were on-board with the work reorganization process and union's participation in it. Central to this was the membership's overwhelming belief in their union leadership, its good relationship with management, the pace and careful consideration of change and employment security at NTL. Over 90 per cent of the membership felt that it was a good idea that the union be involved in the workplace reorganization process. The results from this work guided future decisions on education, research, strategy and action directly.

Following the presentation of the research in its completed form at the closing event of the CEP's TARP activity, amidst the general mood of celebration, Local 6 president Donna Lazure, shared news that would signal an important shift in union-management relations. Indeed, this shift had been partially pre-figured by the souring relations at Bell

Canada earlier in the year. Lazure indicated how the local leadership had been invited to be part of a key planning session for which it was caught completely off-guard. Important strategic planning decisions for the next five years were put on the table by NTL management with little advance warning and there was little Local 6 could do. It was a time when the personal energies of Lazure and the rest of the leadership were almost exhausted and the basic deficit of resources they had faced throughout the process had caught up with them. Compounding difficulties, by the end of 1995 both Martin and Garcia-Orgales were feeling pressures pulling them away from intensive involvement with Local 6 [10].

NTL management had begun to go into what was described as “crisis mode”, and had made the shift toward a top-down, adversarial approach to workplace change. At a September 1996 union convention in Quebec City, Local 6 introduced, circulated and spoke to a document entitled “We have to move on folks”. Lazure spoke to her local’s experience, its learning and to the change in approach they were now dealing with:

Many of us have worked at Northern Telephone Limited for two decades, some for longer than that. In that time, we have seen different management fads come and go. . . . But after the 1988 strike, things really did shift. . . . Late last year, the employer informed us that they had to move to crisis mode. They set up a Transformation Team to establish specific targets for cuts, and while they rarely used the term “process reengineering”, that is how they began to operate. . . . [T]he era of power sharing is over (CEP Local 6, 1996, pp. 1-2).

In the labour movement, major shifts in policy, strategy, politics, as well as the economic context for workers, are marked by changes in educational programs. This represents the conscious organizational response of workers and their representatives to cope with change, and it can be used to chart the process of union learning. According to Martin, February 1996 saw an important shift from courses such as “Facing management and interest-based negotiating” rooted in critical but participatory labour-management relations, toward courses like “Workplace reorganization and unionism in a changing workplace”, and later another called “Union judo”, the latter of which featured a decidedly defensive approach that no longer depended on forms of genuine union-management co-operation. In an

interview in the summer of 2000, using his 1996 day-book calendar as a reminder, he recalls the changes:

By this time, I’m already designing “Union judo” courses. . . . And by October 15 [1996], I’m meeting a full day with Jorge on “Union judo” course design . . . I actually see the change in three phases. First phase is “Facing management” to understand them; the second phase is “Workplace reorganization and unionism in a changing workplace” . . . “Union judo” comes in when all that stuff is falling apart and it’s actually, I know out west I called it dealing with downsizing, contracting out and increasingly aggressive management, so it’s about when “re-engineering” really hits (interview with D’Arcy Martin, July 2000).

Downsizing had begun in earnest at the NTL worksites, and the local was in difficulty. The underlying focus of the get-togethers during this phase dealt with stabilizing and rebuilding the local with the immediate task of trying to negotiate decent packages for those workers being let go. The “experiment” at Local 6 was over, and this meant the union could no longer justify investing as much time and energy from the regional office. This shift in resources and change in context radically altered the shape of union learning in Local 6, but was clearly more widespread than this. As Martin alludes to above, in many sectors of the Canadian labour movement, education by the late 1990s had begun to shift towards discussion of open conflict where co-operation took a back seat to civil disobedience and escalation campaigns.

Conclusions

Delving into the specifics of a case study like the one outlined above gives colour, texture and visibility to the full range of practices that inform a broad conception of union-based workplace learning. It describes an important practical educational experiment in worker mediation of workplace planning, and it details learning beyond the narrow concern for profitability and competitiveness. It fills in the details of a “new work system” referred to in the quotation from Martin that began this paper. Specifically, we can see how an education/research dynamic rooted in the union local helps build the potential for workplace democracy and organizational capacity in the labour movement. The learning that emerged from the education/research

dynamic affected both the organizational life of the workplace as well as the organizational life of the union. Building capacity for informed, participatory democracy through education and research in the local paved the way for the levels of influence, within the limits of advanced capitalism, which the local was able to achieve in the workplace.

Indeed, the case study has helped make clear the limits of workplace democracy within capitalism. As the opening quote from Martin suggests, the type of activities we saw at CEP Local 6 involved encroachment by workers on “management rights” in several ways. It could be argued either that the union did not achieve the levels of participation and control it sought or that they achieved these goals all too well, forcing management to return to a traditional “power-play” and re-assertion of control. One thing that is crystal clear is that skills and knowledge building of this type are important if we are to entertain an interest in the development of economic democracy and that this knowledge building process requires substantial union resources. Union education, research and policy development play important roles in opening up the possibility for new forms of work, but limitations in basic resources make sustained, progressive change in the area of workplace reorganization particularly difficult to achieve. The question of distribution of scarce resources for locally-based education/research activity thus represents a major organizational decision for Canadian labour.

Through this case study we can begin to see how the union can become a school for economic democracy. In its broadest sense, the study provides a micro-example, as limited and as short lived as it may have been, of a different way of organizing the workplace. It is a model that fits with the kind of broad and progressive role for unions envisioned by writer/activists such as Guérin (1970) and Goldman (1972). For them, the kind of union learning that made up the education/research dynamic discussed above had little to do with the way most workplace learning is understood today. Rather, union activities were thought to be a source of social change having, as Goldman (1972, pp. 67-8) put it:

... a constructive and educational effect upon the life and thought of the masses ... by developing and educating the workers and cultivating their spirit of solidarity, to prepare them for a full, free life ...

The “experiment” at Local 6 may have ended, but the preparation for forms of economic democracy it provided has not been lost.

Notes

- 1 At the time, D’Arcy Martin was a National Representative with the CEP and the Ontario region’s education specialist. At the time of the case study, Jorge Garcia-Orgales was an independent labour researcher and the coordinator of the CEP’s Technology Adjustment Research Program.
- 2 See Sawchuk (2000) for additional discussion of this dynamic and the role of research and education at the level of the union local in the Canadian labour movement.
- 3 This paragraph describes the basic elements of an Activity Theory approach (Engeström *et al.*, 1999) to union learning. Recent work by Worthen (2001) out of the USA as well as Sawchuk (2001a, b; 2000), and Sawchuk and Livingstone (2000 forthcoming) have also initiated an activity theoretical analysis of trade union learning.
- 4 An interest in the philosophy of Edwards Deming, initially discussed at Bell Canada, was eventually brought to NTL. The unions at Bell Canada were also eager to see how the process at NTL played out (interview with Terry O’Connor, TARP researcher/CEP Local 44, October, 1997). Bell Canada’s ownership of Northern Telephone stemmed from the period before deregulation. Companies like Bell Canada set up independently operated companies in individual provinces such as Ontario, since under provincial regulation, these smaller independent companies could often be more profitable.
- 5 Interestingly enough, Local 6 was very familiar with strategic opportunities for pushing a union agenda within quality programmes, and actually made the offer of joint programmes in 1991. However the company refused to become involved in such a programme at this time.
- 6 Interview with D’Arcy Martin, July, 2000.
- 7 Interview with Vic Morden and John Edwards (CEP national representatives servicing Local 6), August, 1995.
- 8 “The Ecology of Work” conference put on by a private firm that Local 6 and CEP representatives took part in. It took place over three days at the end of September in Montreal. There was a place made for CEP education representative D’Arcy Martin on the 29 September and a handful of other labour representatives.
- 9 This course was developed for a National Conference of Telecommunications Locals held in Halifax a few weeks before the Local 6’s course. It was used in Local 6 but developed for the national conference. This adds yet another important layer that must be understood in analyses of union learning, in that there is a distinct process of “cross-fertilization” that occurs between union local within

and between unions *vis-à-vis* curriculum development in the labour movement.

- 10 In an interview, Martin talks about the emerging need to provide educational support for Locals at the Canadian Broadcasting Corporation, while Garcia-Orgales mentions his growing involvement with the Communications Technology Adjustment Committee (CTAC) of the CEP. CTAC was a project of CEP and GCIU (Graphic Communications International Union). This occurred in combination with the fact that TARP resources ran out and thus further involvement with NTL could not be supported.

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