Building Cross-Border Trade Union Solidarity in the Americas: Putting Organizational Identities at Stake

Construyendo solidaridad sindical transfronteriza en las Américas: Poniendo las identidades organizacionales en juego

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Abstract

Purpose: This article considers an in-depth intra-case analysis of a North-South alliance that came into being in the Americas, where the absence of any state power regulating such initiatives makes their emergence more complex.

Methodological design: To substantiate this case, some 77 semi-structured field interviews were conducted between 2004 and 2018 with 60 key union representatives in the mining industry.

Results: They confirm that a key to the success of transnational alliances lies in the actors' ability to develop a community of risks and fate built around a strong sense of belonging to the group, in opposition to opponents and in the name of clearly defined project and scale. They also confirm that three main levels of contingencies have shaped the alliance's evolution.

Research limitations: Even though our findings cannot be generalized, wider lessons can be learned from this contribution.

Findings: They dissolve the analytical relevance of the North-South cleavage which appears to be overused conceptually. The plasticity of the union responses in terms of transnational solidarity are also strongly rooted in space, time and the contingencies of the moment. Such findings open up an almost limitless field of possibilities for future research and validation in both the North and South.

Resumen

Objetivo: entender los impactos de las identidades organizacionales en el funcionamiento interno de una alianza sindical transfronteriza que tuvo lugar en la industria minera en las Américas.

Diseño metodológico: para documentar este caso, se condujeron 77 entrevistas semi-dirigidas con 60 representantes sindicales clave entre 2004 y 2018.

Resultados: el éxito de este tipo de alianzas reposa sobre la creación de una comunidad de destinos entre los actores participantes, con base en un proyecto y opositores claramente definidos. Confirman también la presencia de tres niveles de obstáculos que moldearon la evolución de dicha alianza.

Limitaciones: si bien no se pueden destacar generalizaciones a partir de esta contribución, ésta enfatiza, sin embargo, lecciones importantes en cuanto a la viabilidad de este tipo de alianzas.

Hallazgos: nuestros hallazgos disuelven la división analítica Norte-Sur, que aparece como un concepto excesiva y erróneamente usado en las investigaciones. La plasticidad de las respuestas observadas reitera que las sensibilidades sindicales frente a la solidaridad transfronteriza son construcciones sociales y relacionales que se deben de entender según las contingencias del momento. Estas conclusiones abren un mundo de posibilidades para investigaciones y convalidaciones suplementarias, tanto en el Norte como en el Sur.

Introduction

Numerous studies in industrial relations have for several years sought to identify the challenges faced by trade unions in both the North and South (Anner *et al.*, 2006; Silva, 2013b). A first body of research has emphasized the structuring conditions of globalization, making the perspectives of union renewal obsolete. Whether involving the internationalization of production or the loss of effectiveness of collective bargaining, the sources of trade union decline are countless. The dual movement of the financial concentration and decentralization of production among transnational companies has made the latter practically elusive, for both labor law based on the integrated firm-model (Martin, 2015; Martin, Dufour-Poirier and Villanueva, 2021) and for trade unions. A second body of literature has attempted to demystify the paths to union renewal. For these authors (including Frege *et al.*, 2004), globalization appears to have brought constraints for trade unions anxious to push through the boundaries of their *traditional zone of action* (Haiven, 2006). This body of research seeks, among other things, to examine the variety and complexity of external networking initiatives, of which trade-union cross-border alliances are at the forefront (Bieler *et al.*, 2015; Erne *et al.*, 2015; Bieler and Erne, 2015; Lévesque and Murray, 2010), also referred to in the literature as global company networks (Croucher and Cotton, 2009).

These studies have the merit of outlining the potential for alliances to achieve the social regulation of employment and transnational companies and counterbalance their growing power (Routledge and Cumbers, 2009). As mentioned in Dufour-Poirier and Hennebert (2015), "these alliances, which bring together unions from different countries representing workers from a single multinational corporation (MNC), have emerged as platforms for exchange, dialogue and the coordination of union action." (p. 1). There is a consensus, however, among several classic authors in the field that identities are at the core of trade union projects (Offe and Wiesenthal, 1980) and the source of their renewal (Hyman, 1994), even transnationally (Frangi and Zhang, 2021). Moreover, the results emerging from more recent analyses (Sarkar and Kuruvilla, 2020; Smale, 2020) call for researchers to conceptualize more clearly what labor transnationalism is, and better grasp the meaning of success in labor trans-

nationalism. By extension, other authors (Brookes, 2019; Frangi and Zhang, 2021) also converge in pinpointing the need to better contextualize the debate on union identity (Dufour-Poirier, 2011; 2016; Dufour-Poirier and Lévesque, 2013).

In this context, the article intends to answer the two following questions. First, what are the impacts of trade union identities on the internal functioning of a cross-border alliance? Second, what are the contingencies (Wright's concepts of *structural and spatial power*) (2000) shaping the organizational identities at stake in this alliance? This article draws on Gahan and Pekarek's (2013) idea of collective action frames and on Greer and Hauptmeier's (2012) notion of identity work, by which they refer to the processes through which an organizational identity is created, sustained and modified. Their studies provide tools for analyzing transnational union solidarity through the lens of *collective identity framing processes*. In keeping with Hunt and Benford's (2012) work, collective identity framing processes are understood here as the raw material of union representation and an essential requirement for overcoming problems, reframing differences of opinion, and facilitating commitment *prior to* engaging collective action. Given that trade unions frame their identities through their interactions, but also in response to the multi-faceted contingencies they face, *this article contends that collective identity framing processes (agency), such as transnational cross-border alliances, intervene prior to the emergence of new modes and levels of action pursued by unions (structure).* Therefore, the way in which the opportunities for action are perceived and used depends on these organizational identities, which are meaning makers: as social and institutional actors, unions (as an amalgam of rank-and-file members and leaders) are considered here as organizational identities' holders (Whetten and Mackey, 2002). For us, collective action (in this case, cross-border alliances) depends, first and foremost, on the actors *identifying as* a group and *identifying with* the goals and the project that such a group pursues, thus fostering a sense of belonging. Without such a collective consciousness, committing to, and endorsing, a collective project will be considered irrelevant (Hunt and Benford, 2012). This argument also takes into account the

downstream contingencies that come into play in order to better understand the internal dynamics of transnational alliances.

To substantiate the case, this article considers an indepth intra-case analysis of a North-South alliance that came into being in the Americas, where the absence of any state power regulating such initiatives made their emergence more complex and disorganized (Bieler *et al.*, 2015). This alliance brought together local unions and national trade union organizations from Canada, Chile and Peru operating in the mining industry. The lifespan (from 2000 to 2008) of the alliance under study involved three major phases of development. In the end, the alliance could appear to be a failed transnational solidarity initiative. However, we think that wider lessons can be learned from this case. This paper is divided into five sections. The first section describes the research method and is labelled a *longitudinal methodology*. The second section recalls that *Collective Identity Framing Processes* at the Heart of Cross-Border Union Solidarity. The third section describes the 3-phase process of building the North-South Alliance at Stake. The fourth section presents the contingencies that undermined the development of this alliance. The fifth section, *Conclusion*, discusses broader considerations in regard to the effectiveness of cross-border trade union alliances.

A Longitudinal Methodology

This project's originality lies in the extended duration of the observations on which it is based. The alliance emerged as a result of six local union initiatives (two refineries and one mine in Quebec, Canada; two mines in Peru; and one refinery in Chile), initially without the assistance of a Global Union Federation (GUF). The three local unions based in Quebec were affiliated with a major nationwide industrial union in Canada (referred to hereinafter as the Industrial Union) that operates in the mining industry. Right from the start, the local unions in Quebec, which launched the alliance, benefited from the support of the Industrial Union. At the time of this study, the Industrial Union was the largest private-sector union in North America and the most active in the metal and mining industry, notably due to its strong activism at the transnational level. Over the years, the Industrial Union invested all kinds of resources in the alliance, such as

funding the travels of union delegations abroad. It also coordinated some follow-up meetings, and ensured, for a few years, the presence of an international project manager based in Canada, responsible for building relations between local trade unions and national federations and confederations in the North and South. Lastly, the Industrial Union coordinated contacts and followed up on the initiatives developed during these meetings. From 2000 to 2006, the Industrial Union in Canada, through its international project manager and until his retirement, more or less formally took on the responsibility for coordinating and monitoring the alliance's activities.

Some 77 one to two-hour, semi-structured field interviews were conducted between 2004 and 2018 with 60 key union representatives working in local, national and international labor organizations in Canada, Chile, Peru and Switzerland. Each of the interviewees was recognized as playing a key role in creating and coordinating the cross-border alliance under examination. These interviews were conducted in the four countries during formal or informal meetings. All the interviews were taped in full and transcribed for analysis. The data collected was analyzed using a method drawn from studies by Yin (2003) in which the researcher is asked to describe the case study as accurately as possible. The following (Table 1 in Appendix 1) provides an overview and chronology of the fieldwork conducted for this study.

Our approach was mainly descriptive and involved an intra-site analysis: this means that the type of unionism, the technological and the economic changes along with the specificities of the mining industry (and its growth) prevailing in one country in particular were not targeted in this study. The alliance as a whole was considered the preferred unit of analysis throughout our research process.

In order to analyze the data effectively, we first transcribed the interviews, recorded with participants' consent, in minute detail. We also took into consideration the notes, comments and impressions resulting from the discussions that were conducted informally, often at the end of the interviews. Close reading of these transcriptions enabled us to put the still-raw data that had been recorded into perspective with the necessary distance. Secondly, we carefully reviewed all the documents from a critical standpoint through attempting to identify the obvious facts they contained and decipher what they

possibly alluded to or implied. Thirdly, the verbatim of the interviews conducted with the union actors were broken down into units of meaning and compared with one another to bring out the similarities and differences on a North-South basis. This coding into conceptual units was a way to identify the analysis conducted by assigning a code or key words to a word, line or paragraph. In doing so, we had a *dual objective*: *1)* to allow the codes to emerge from the data, and, especially, *2)* to gradually extrapolate from the recorded material a general, *meaningful* pattern on the basis of our analytical framework. The codes used with the Atlas.ti software confirmed the presence of a number of patterning levels and stages in our analysis process. Following that, we carried out an iterative pruning of data deemed equivalent, recursive or unnecessary to prioritize other data considered essential for properly understanding our subject. This constant process of manipulating and revising the codes assured us of the relevance, conceptual validity and accuracy of the encoded passages: the identification of *regularities* and possible co-occurrences result from a first, second, and even third review of our data, refining the level of analysis and abstraction developed as a consequence of our contact with the field during the various research phases. This organization took the form of synoptic tables that also provided an overview of the quotes used to substantiate our argument.

The sources of information used include interview data, corporate documents, articles from the print media and union publications. All such materials, as well as our field notes and various travel reports, were coded in their entirety. Triangulating the data from these different sources and methods of data collection allowed us to achieve data saturation, further validating our findings. This wealth of written information and verbal accounts helped to deepen our understanding of an alliance built in a particularly unstable corporate context. Visits to plants and meetings with workers at several production sites in the three countries took place at different phases of the study. Our status as an observer and a researcher, which included accompanying delegations of Canadian union representatives during visits to Chile and Peru, was always clear, in all phases of the research process.

The accounts collected revealed the respective organizations' overall viewpoint in terms of identity. Our analysis focused nevertheless on the internal functio-

ning dynamics of the alliance as a whole. It should be stressed that we did not look at the dynamics punctuating the organizational life of each of the participating unions. Last, but not least, ethical constraints completely prevent us from revealing the identity of the company and the representatives consulted. Any breach of anonymity could potentially affect the safety of some of these representatives, particularly those in the South. The interviews will simply be referred to by number and the year in which they were conducted. Our results are presented chronologically, based on the changes that occurred within the transnational employer, CanMin1, which later became CanMin2, and lastly EuroMin. Table 2 in Appendix 2 enables an assessment of the magnitude and scope of the fieldwork that took place over a period of 10 years, which not only allows us to maintain the validity of our analyses and of the concepts used, but also the reaching of the saturation point desirable in any research initiative.

COLLECTIVE IDENTITY FRAMING PROCESSES AT THE HEART OF CROSS-BORDER UNION SOLIDARITY

Transnational alliances are a complex phenomenon, still in the midst of a period of growth and experimentation. However, their study is not new. A first body of literature has explored them from the perspective of *cross-border trade union alliances*. These alliances are composed of groups of trade unions representing workers in the same transnational corporation and are established in a more or less formal, *ad hoc* and structured manner in order to militate for the safeguarding of trade union rights, to denounce union repression or to support a struggle therein (Greer and Hauptmeier, 2012). They create opportunities for actors to coalesce around common issues to challenge current power structures and intervene on multiple levels, despite the distances (physical, political, linguistic, etc.) separating them (Dufour-Poirier, 2011; 2016; Dufour-Poirier and Hennebert, 2015; Dufour-Poirier and Lévesque, 2013). Studies such as those by Fairbrother *et al*. (2013) have documented the process leading to the creation of such alliances, the forms of action emerging from them, and the obstacles they face. However, Brookes and McCallum (2017) "suggest that this cacophony of case studies on labor transnationalism

from diverse disciplines offers more trees than forest" (p. 208). Anner *et al.* (2006) also claimed, 15 years ago, that more systematic and contextualized comparisons were needed to synthesize all these very diverse case studies.

A second body of literature has examined the variety and complexity of external networking initiatives, this time under the cover of heterogeneous alliances (Routledge and Cumbers, 2009; Tattersall, 2010; 2018). These networks of activists entail the establishment of relatively durable, flexible and inclusive relations between union organizations, and sometimes other civil society actors, in order to work together on broad socio-political issues that go beyond the strict framework of traditional union demands (e.g., wages) in workplaces. These alliances differ from one another in terms of the variable involvement of the actors participating in them, the fluctuating intensity of relations between them, the collective actions stemming from them and the level of intervention favored. Through them, trade unions open up new channels of communication that are likely to re-build the effectiveness of their actions and their political leverage on the societal scene (Dixon and Martin, 2012). Without exhausting all theoretical avenues, studies on cross-border alliances (Bieler *et al.*, 2015; Dufour-Poirier and Hennebert, 2015; Greer and Hauptmeier, 2012) and social movements (Gahan and Pekarek, 2013; Melucci *et al.*, 1989) have acknowledged the importance of organizational identities in the process of launching collective action, and the need to deepen our understanding of the micro forces shaping them (Dufour and Hege, 2010; 2013; Fox-Hodess, 2020; Frangi and Zhang, 2021; Smale, 2020).

Similarly, Kay (2011) sees labor transnationalism "as a process of creating a transnational union culture based on cooperative and complementary identities defined as shared recognitions of mutual interests coupled with a commitment to joint action" (p. 27). By extension, a growing body of both theoretical work (Hunt and Benford, 2012) and empirical studies (Kirton and Healy, 2013) has also claimed that solidarity gives rise to social and moral cohesion (Morgan and Pulignano, 2020) which, in turn, depends on *an awareness of the group* and on *identification with the group* or with the collective conscience and goals that it disseminates. This identification process refers to the delineation of the *we-feeling* which, in turn, entails a sense of mutuality and solidarity that enables organizational actors to share a sense of loyalty, morals

and emotional meanings in time and space and to endorse a project based on a perceived common cause and fate. Building on Melucci's previous work (1995), actors thus get involved in collective action if they have the ability to maintain these identities that make undertaking and justifying strategic action legitimate and possible. Collective identities act then as a sort of strategic compass, guiding the way actors frame the problems with which they are confronted, interpret situations and give meaning to their relations with others and their environment.

However, reinstating the importance of collective identities does not discount the multi-level nature of the challenges confronting trade unions. Collective identities are socially constructed and contextually anchored, as are trade union behaviors, which are highly sensitive to context (Greer and Hauptmeier, 2012). Even though identities are far from being determined only by external contingencies (Marginson, 2016), trade union responses to transnational solidarity are nevertheless shaped by the latter and subject to constant change: identities can only be considered as the outcomes of external opportunity structures and self-awareness. We thus contend that the driving force behind a cross-border trade union alliance lies in collective identity framing processes; that is, trade union participation in a transnational alliance is based on a union's ability to frame and upstream, in relation to the contingencies facing it, the relevance of uniting around cross-cutting causes in order to engage in a collaborative process. Transnational solidarity has to become a *meaningful priority* for the trade unions involved and they need to identify with it before opting to act at this level (Föhrer, 2015).

A first level of constraints refers to union practices and routines. The level of inventiveness required here is often difficult for local unions to mobilize since most of them, especially in the South, are not always properly equipped to take their struggles to the transnational level due to a critical lack of resources (financial and human), whereas in the North, without generalizing, the temptation to rely on advocacy tools and micro-corporatist strategies, which have been tried and tested in the past, can be strong (Vogler, 1985; Marginson, 2016). Moreover, deep-rooted traditions of collective representation, a dense relational past and a strong regional identity can also arouse suspicions and lead trade unions to solve their problems locally (Silva, 2013a; Stevis and Boswell, 2008).

Bernaciak (2010) and Fetzer (2008) developed interest-based frameworks to explain why some unions may be less inclined to internationalize their action, especially if they have access to options for acting locally and national solutions no longer appear viable, restraining the possibility for them to act and establish a shared sense of *we-ness* at the transnational level. Yet, participants need to have the ability to adhere to the importance of transcending the diversity of their practices, their possible rivalries and their socio-economic realities for the sake of "making meaning" (Tarrow, 2011).

A second level of constraints relates to the employer as well as to the structural factors (Wright, 2000) and existing competitive dynamics in the mining sector. On the one hand, the instability of the corporate actor, the fluidity of its industrial capacities, the complexity of the inner structure of multinational companies and their ever-changing nature appear to severely erode the capacity of trade unions to develop collaborative ties on a transnational basis. On the other hand, in the mining industry, a producer-driven and particularly volatile sector (Gereffi, 2001), unions could possibly be tempted to renew their repertoires of action through local and national strategies or fall back on microcorporate strategies. These options raise the possibility for them to exploit the advantageous balance of power afforded by their position within the value chain of their home multinational company, even though spatially fixed mining operations often make the use of coercive comparisons, or threats to offshore production, fruitless. The outflow of jobs to the South, successive merger and acquisition operations and virulent anti-union strategies have disrupted the development and the sustainability of cross-border alliances in recent years. By constantly threatening to suspend their investments and withdraw their infrastructure, such corporations force workers to compete among themselves and suspend any effort to transnationalize their action. Furthermore, this instability also appears to negatively affect the ability of union representatives in the North, but even more so in the South, to convince their members that alliances are relevant and to ensure that their involvement at the transnational level will not end up costing them their positions (Anner *et al.*, 2006; Anner, 2011).

A third level of constraints, which we will not dwell on, relates to the institutional level. Cross-border allian- ces face complex challenges, especially since they seek to align heterogeneous labor relations regimes, union traditions and socio-economic realities (Croucher and Cotton, 2009; Vogler, 1985). Furthermore, the limited effectiveness and the hostility of institutional channels, which are particularly hostile in Southern countries where union activists can expect day-to-day reprisals for their activism, can also undermine the feasibility of transnational action (Silva, 2013a). Table 3 in Appendix 3 enables comprehension of the extent of the differences between Canada, Chile and Peru identified on the institutional level in regard to the framework for collective labor relations; such challenges certainly complicate the possibility of creating interunion ties transnationally. Finally, in addition to this are the linguistic, cultural and geographical distances separating them and the coordination costs that establishing such relations can entail for actors.

The North-South Alliance at Stake

Phase 1, Growth and Integration (1990-2004)

The idea of an alliance emerged in the late 1980s. At the time, the local Quebec unions of the CanMin1 production chain possessed strong collaborative traditions across Canada. Back then, the multinational employer was Canadian and its headquarters was based in Montreal. CanMin1 agreed that the collective bargaining processes at its production sites would be held in a coordinated manner every three years. For the local unions involved, this process implied the obligation to seek what had been conceded to its neighbors, with the understanding that, even if they were aware of some negotiated clauses, those clauses could never be considered to be won in advance. This coordination turned out to be all the more effective since it was accompanied by regular meetings between company management and leaders of the Industrial Union in Canada and its local affiliates, the latter being particularly active in Quebec. A relative balance of power, favorable to all local trade unions based in Canada, was observed.

In the early 1990s, the closures in quick succession of several CanMin1 production sites, along with increasing job insecurity, prompted the unions to take action at the transnational level. As jobs were being moved

to Southern countries, means had to be found to push for exchanges. In this context, the international project manager of the Industrial Union helped to strengthen relations between local union affiliates across Canada and to organize meetings with local unions, national federations and confederations operating within CanMin1 in South America. Such contacts helped to forge trust between all the trade unions in the CanMin1 production chain and to underscore the magnitude of the gaps between the North and South. Given the urgency of the situation, it was agreed among the participants that those contacts should be facilitated and expanded further.

The Summit of the Americas in 2001 presented an opportunity to deepen communications. Meetings were held that led to the creation of a transnational roundtable with all the local unions operating in the CanMin1 production chain, including national federations and confederations with whom the former were affiliated. The Industrial Union in Canada saw fit to set up a temporary commission of inquiry responsible for investigating the behavior of four multinational companies in Latin America, including CanMin1. In Canada, several local trade unionists understood the need to include, in the collective agreements in Chile and Peru, clauses from the collective agreements signed in Canada in order to protect jobs in the North and raise the standards of working conditions in the South. According to a local union representative in Peru, the aim of establishing relations was to obtain information that was likely to contribute to the development of better-informed union strategies, especially when negotiating labor contracts.

> In the North, this relationship is important, because if countries like ours, in the South, don't manage to improve our conditions, jobs will continue to be cut in your country. For us, this relationship is important because the support it provides us helps us strengthen our work. The information we obtain on CanMin1 and its strategies in Canada is invaluable to us. (Interview no. 14, personal communication, 2005, August 30th).

Subsequently, all parties agreed that it was important to develop coordinated strategies to deal with the common foe, CanMin1, and exercise a more effective counter-

vailing power. In 2004, Canadian trade unionists began to fly to Chile more regularly to strengthen the ties of solidarity created during the Summit of the Americas in 2001. With the help of the international project manager in the Canadian Industrial Union, meetings were organized with local unions as well as with national unions and confederations in the Chilean mining industry to deepen discussions on working conditions and collective bargaining processes and to develop better-informed strategies to face the employer. A local Chilean trade unionist confirmed that these meetings were important, serving first and foremost to dismantle the employer's misinformation strategies, confirm the distorted bases of coercive comparisons used by the latter and exert stronger and more demanding union action:

> In Chile, this experience has helped us get to know CanMin1 and be better prepared. We analyzed the company's behavior in several seminars. We've come out of these discussions stronger. We have a better idea of the employer's strategies, which will allow us to have more impact at the bargaining table. I will no longer be scared when I'm told: "We're going to shut down a department." I now know that this is a tactic to make me tell the workers: "Shut up, because they can close our plant in Chile any time!" (Interview no. 51, personal communication, 2005, November 9th).

Through these meetings, collective agreements were exchanged and the participants realized that *all CanMin1 workers were in the same boat,* making the employer's identity clearer and more sharply delineating the boundaries of the emerging union community at the transnational level. The reluctance of CanMin1 managers in Chile to host the delegation of local and national unionists from Canada at several production sites became an incentive that heightened the participants' desire to further nurture these exchanges and develop joint action. Phase 1 of the alliance's development coincided with a major strategic alignment being established among the participants. The project became increasingly clear. Despite the disparities in resources between the North and South, a synergy of interests and closer coordination of actions were being established.

Phase 2: Expansion and Consolidation (2005-2006)

The success achieved in Phase 1 continued in Phase 2, the beginning of which coincided with the period in which CanMin1 was taken over by CanMin2, another Canadian multinational company whose headquarters was, at that time, based in Toronto. The acquisition of CanMin1 by CanMin2 and their merger in 2005 strengthened the participants' desire to keep the long-established channels of communication open on a North-South basis and to formalize what was beginning to look more and more like an alliance. In fact, the participating union organizations now wanted the emerging alliance to be considered the only valid interlocutor with the employer. The threat that CanMin2 might be taken over by a Chinese multinational of questionable repute in respect to its anti-union practices, which were worse than those used by CanMin2, convinced the Industrial Union in Canada to increase contacts with its counterparts in Latin America as well as with other actors (e.g., NGOs). According to a local Chilean trade union leader, the rationale behind this project was to no longer trap collective bargaining at the local level, but rather to deploy a unified trade union strike force transnationally and level up the negotiated collective agreements as a result.

> To find a way to unite [transnationally] and approach CanMin2 as a whole and say: "We all want to negotiate at the same time." At our plant, if the manager claims that the financial statements show we're operating at a loss, we'll be able to reply that the company made billions of dollars this year! (Interview no. 38, personal communication, 2005, November 7).

In June 2005, a meeting was set up in Canada. Local unions as well as national federations and confederations from Canada, Chile, the Dominican Republic and Peru took part in the discussions. Summary tables were circulated showing the employee benefits, wage gains and expiry dates of the collective agreements in force in Canada, in Chile and in Peru, with a view to demanding minimum standards throughout the entire CanMin2 production chain. Visits to several production sites in Canada were also organized to allow trade unionists from the South to observe the working conditions, mining te-

chnology and occupational health and safety measures in place.

These contacts led to organizing a second trip to Chile in November 2005, again through the support of the international project manager in the Industrial Union based in Canada. Training seminars and workshops allowed for the transfer of expertise and diversified experience among trade unionists. Numerous issues were discussed (e.g., workplace harassment, the calculation of and compensation for overtime, working hours, occupational health and safety as well as pollution). As in the past, common issues resurfaced (e.g., collective bargaining, subcontracting, occupational diseases associated with working in higher altitudes, issues related to life expectancy and the quality of life of the miners concerned, making union activities safe, the precariousness of the employment relationship, and respect for the environment). These discussions led several union leaders in Chile and Peru to innovate and to reframe their own views of their allies and their boundaries of action. A local Peruvian trade unionist even stated that they had succeeded in negotiating excellent working conditions by negotiating outside their country's borders:

> The Canadian Industrial Union sent us three different collective agreements. We worked with these documents and those we were able to gather in Chile. We had more foreign collective agreements than Peruvian ones. Our collective bargaining process was anything but Peruvian! We managed to obtain what we did because we didn't limit ourselves to the boundaries of Peru. (Interview no. 63, personal communication, 2005, November 11).

In December 2005, another meeting of all the unions in the CanMin2 production chain was organized in Canada. The announcement of a second potential takeover of CanMin2 by another Chinese conglomerate again caused huge concern among the participants, who expected the worst in terms of non-respect for freedom of association and collective bargaining, job losses and severe environmental damage. The urgent need and consciousness to develop a transnational union strategy around a close-knit community of action was reiterated. Following this, a third Canadian delegation was sent to Chile in 2006.

Those meetings laid the groundwork for an enhanced and more formal and institutionalized version of the alliance through the building of a Global Company Network led by the trade unions present throughout the employer's production chain. This structure was meant to exercise a more refined union countervailing power in order to deal more assertively with CanMin2.

The alliance's achievements in Phase 2 led to a degree of systematization among the participants in terms of sharing information (e.g., the main issues at stake in various production points within the multinational company) and resources (e.g., expertise and collective agreements). An increasingly close-knit community of action gradually emerged around a transnational employer that was still relatively easy to identify. This progress was made possible by increasing contacts between the participants, broadening their respective aims in regard to the need to transcend the boundaries of their immediate sphere of action and collaborate with one another. The regular investment of resources (human and economic) by the Industrial Union in Canada and the prioritization of the alliance within its internal structure also contributed to these successes.

Phase 3: Disintegration, Withdrawal and Tentative Resurgence (2007-2008, 2018)

In June 2006, the operations of CanMin2 were taken over by EuroMin. The change coincided with the retirement of the international project manager at the Industrial Union, who had been coordinating the alliance's activities from Canada. Furthermore, involvement at the transnational level had ended up costing the union several positions held by trade unionists at the local level, elected for 3-year mandates in Canada and 2-year mandates in Chile and Peru. This union volatility made it more difficult for the alliance to move forward and for the local leaders involved to convince their respective members that these contacts were of utmost importance.

In 2007, the first meeting of the new EuroMin production chain was held in Canada. All the local affiliates of the Industrial Union in Canada participated in this event. It highlighted the difficulties involved in identifying an ever-changing employer, developing a trade union community of action with a common project and taking up converging positions regarding the elusiveness of the

opponent to be confronted. There was no mention of the Global Company Network referred to in the past. No schedule for future meetings was set and no strategic orientation defined. Union positions on the project were more uncertain than ever.

The alliance came together again one last time during a brief meeting of the local Quebec EuroMin unions in November 2007 in Canada. No Latin American counterparts were invited to attend the event. In fact, establishing new contacts abroad proved to be more complex than expected given EuroMin's gigantic and sprawling corporate structure. Moreover, as seen earlier, several leading figures, who were still in the union and who had been well known in Canada, Chile and Peru (and had managed to remain in place in the previous phases of the alliance), no longer held office. The lack of a strategy organized around a structured project and disseminated as such to the participants exacerbated the disavowal and anger felt by many national trade unionists, particularly in Canada.

> If there was a strategy, if we could say, "This is what we intend to develop in the coming months"… We need to connect with our base, the local union—inform them that there's a Global Company Network. [We need to tell them,] "This is what we want you to say at the general assemblies as the local leader." What does the Global Company Network do? What would it give us? We can't tell our members anything, because we don't know! […] We've created expectations for nothing. (Interview no. 58, personal communication, 2008, October 15th).

Nevertheless, numerous local participants wished to restart the discussions despite the difficulty of establishing reference points to guide the alliance's future. In October 2008, a meeting was held involving the entire EuroMin production chain, this time on a transnational basis. An impressive number of guests (among them, non-union actors such as human rights and environmental organizations) answered the call. Several issues were brought to light (e.g., the increase in the workforce and productivity of EuroMin across the world). The high point of that meeting was the creation of a committee to monitor EuroMin's actions. It was agreed that the Com-

mittee would meet at least three times a year and present an annual activity report to the alliance.

The meeting led to the adoption of a declaration confirming the participants' commitment to rapidly restarting discussions and relaunching the project. There was a revival of the idea of building a Global Information Network, although with a much less formalized structure than the Global Company Network discussed previously. A number of participants were not overly enthusiastic about this idea. The decreasing exchanges coupled with the alliance's lack of clear goals gave rise to frustration. Such obstacles exposed differences in the interests and opinions of the participating unions on a North-South basis and consolidated the gaps separating them rather than bringing them closer together. One Peruvian union representative expressed resentment regarding the lack of follow-up on the project by the Canadians, who had the resources to ensure it, and blamed the decline of the alliance on the selfishness of northern workers.

> The project made sense, but we weren't able to clarify its goals. What did we want to do? As a trade union in Peru, we were hoping for better communication [...] We're wasting time and going around in circles, and in the end, we, trade unionists around the world, don't have any influence over anything. Instead, we should be discussing all the local unions' collective agreements, which are to be renegotiated in 2009 across the world. In particular, we should be asking all the EuroMin unions based in Canada to send their agreements to their Latin American counterparts to guide us in our preparations. All the unions that will have to negotiate soon should be sent agreements from all over the place. This still hasn't happened and it never will. Canadian unions are too selfish! (Interview no. 42, personal communication, 2008, October 14ᵗʰ).

Phase 3 of the alliance's development showed a breakdown in the cross-cutting identity markers which, until then, had been nurtured among the participants. The employer's identity was now more difficult to grasp, making the project underlying the alliance increasingly elusive and uncertain. The retirement of the interna-

tional project manager in the Industrial Union and the removal of the group of leaders most heavily involved in the alliance exacerbated the difficulties on that level. Moreover, differences between the relative power and interests of the Canadian unions and their Southern counterparts were brought out into the open. Unions in the North faced insurgencies from internal members because of the latter's perceptions that the alliance, after all these years, had no purpose and merely amounted to union tourism. For their part, unions in the South also faced internal criticism over the lack of direction of the alliance, which was increasingly viewed as inspired by Northern protectionism disguised as transnationalism. To put it bluntly, the Southern unions seriously questioned whether the ideals underlying the alliance were really those of transnational solidarity.

In April 2018, after a 10-year period of stagnation, the alliance attempted to re-emerge in Switzerland. The GUF, which had been involved in the past, brought together local unions from all over the world. Its aim, as previously, was to encourage them to discuss their most pressing respective issues and to unite them under a common banner, namely for implementing a minimum standard for occupational health and safety across the entire EuroMin production chain. However, the representative in charge of the file in the GUF felt that the issues behind the creation of such an alliance were highly ideological. Creating such an alliance would eventually imply a definite leveling of working conditions in the production chain, upwards for workers in the South and downwards for their counterparts in the North, in the name of the common ideal of class struggle. This project has still been slow to materialize, and has been in a new period of latency ever since.

> The issue is ideological and political. Some of the powerful unions in the mining sector tend to be corporatist and nationalistic. Protectionist. The whole question lies in how trade unions in America can sacrifice the whole foundation of global trade unionism for a nationalistic stance. They tend to opt for a nationalistic stance and don't care about the impact of their demands, to the detriment of others. Northern unions demand solidarity when they're going through something rough but that doesn't

work. (Interview 68, personal communication, 2018, June 2nd).

The table 4 in Appendix 4 broadly outlines the evolution of the alliance studied.

CONTINGENCIES SHAPING THE COLLECTIVE IDENTITY FRAMING PROCESSES

Our study establishes that organizational identities are a fundamental element in understanding how transnational trade union alliances function and develop. Organizational identities are conceptualized here as social constructions that are dynamic, that are defined by their situation in time and space and that evolve through exchanges between the actors. As true *strategic compasses* (Dufour and Hege, 2010; 2013; Dufour-Poirier, 2011; 2016; Dufour-Poirier and Hennebert, 2015; Hunt and Benford, 2012; Melucci, 1995), they determine how actors define problems, consider solving them and identify sufficiently unifying incentives to pool their efforts in a transnational alliance. On the one hand, the results emerging from our analyses confirm that a key to the success of transnational alliances lies in the actors' ability to develop, upstream and based on their exchanges and reflections, a community of risks and fate (Greer and Hauptmeier, 2012), in short, a transnational trade union culture (Vogler, 1985; Kay, 2011) built around a strong sense of belonging to the group (we-feeling) (Föhrer, 2015), in opposition to opponents and in the name of clearly defined project and scale (Tattersall, 2010; 2018). On the other hand, this study highlights the plastic, relational and situational nature of the collective identity framing processes underlying the decision by a union to participate in a transnational alliance and adhere to the ideals of solidarity it conveys (Dufour-Poirier, 2011; 2016). These organizational identities, generated by the actors based on their exchanges and experiences, influenced their choices regarding union solidarity.

However, three main levels of contingencies shaped the alliance's internal dynamics and development. The first level of contingencies relates to the dynamics that punctuated the internal life of the unions participating in the alliance, especially as regards the allocation of resources (budgetary, human, logistical, etc.) relating to alliance building, particularly in the North (Marginson,

2016). We refer to this as the dual process of centralization-decentralization. In our case, this opposition refers, on the one hand, to the gradual reduction of resources invested in the project by the Industrial Union in Canada and, on the other hand, to the progressive centralization of the work carried out by its decision-making structure over the years. This process prevented the local trade unionists from participating in the discussions undertaken by the alliance, which would have helped them better identify with it and grasp the relevance of the cross-national understandings, synergies and strategies it intended to develop: these considerations confirm Sarkar and Kuruvilla's work (2020) that states the importance of allowing local concerns to find voices in global campaigns in order for them to result in concrete gains at the local level and to be considered relevant. In our case, a number of the local leaders were unable to maintain the contacts they had sought to establish, which decreased their motivation to continue participating in the alliance.

As noted by Spalding (2013), "differentiating local actors, [national] and transnational ones as well as delineating their respective roles can be particularly challenging"(p. 26), in any alliance-building effort. In addition, the retirement of the international project manager and the failure to replace him at the Industrial Union, as well as the non-re-election of several of the local trade unionists most heavily involved in the project, also weakened their ability to continue negotiating their differences, to frame the relevance of those contacts and to strategize around the collective cohesion developed over time. Another very critical aspect was the lack of multiple contact nodes of coordination (Diani, 2019), which could have helped the too-soon retired and never-replaced international project manager at the Industrial Union ensure the development of the alliance. This "branded knowledge broker" (Agarwala, 2014) acted within the alliance as an "imaginer" (Spalding, 2013), meaning that he was able to prompt all the trade union representatives involved to connect with one another, to facilitate the circulation of new ideas, and to articulate connections across differences and levels, both horizontally and vertically (Routledge and Cumbers, 2009). These roles were in addition to those he played as a translator (responsible for diffusing knowledge), coordinator (in charge of organizing the distribution of resources and

responsibilities) and articulator (able to bring together actors) (Von Bülow, 2013), facilitating discussions. These roles also eased tensions among the participants and united them around sufficiently cross-cutting and mobilizing identities to overcome their distinctive features. Such key individuals can act as the glue for an alliance to adopt horizontal and vertical operational logics at the same time: their absence here was found to be critical (Routledge and Cumbers, 2009) and did not prevent the alliance from becoming overtly unsuccessful over time.

These findings also critically reiterate the importance for umbrella organizations in the North, in this case the Industrial Union in Canada, to ensure follow-up and cooperation and to invest a minimum of indispensable resources, in particular human resources, in a spirit of labor empowerment rather than the philanthropic labor spirit traditionally associated with the protectionist policies of Northern labor (Agarwala, 2014) or limited corporate internationalism (Vogler, 1985). Moreover, such issues corroborate Brookes and McCallum's (2017), and Sarkar and Kuruvilla's (2020) findings that belonging to multinational companies does not constitute a sufficiently unifying bond for establishing minimum working relationships. In our case, facing a common and highly unstable enemy did not represent a sufficiently clear project of resistance (Hochstetler *et al.*, 2013) to lead beyond the search for the lowest common denominator.

Based on Diani's work (2019) on networks and also on that of Sarkar and Kuruvilla (2020), these issues substantiate the need to multiply mediating and coordinating contact nodes, decentralize the decision-making process, and enable all the actors involved to launch initiatives, strategize around the incentives established through their exchanges and nourish, from a multi-level perspective, the internal dynamics of the alliance. We are referring here to the concept of "centralized decentralization" developed by Gallin (1994), which emphasizes the need for a back-and-forth dynamic between the interventions conducted by the top tier of the union hierarchy, at the national and transnational levels, and those conducted by the local activist base to ensure the efficiency and sustainability of all kinds of in-breeding initiatives. To give rise to increasing trade union counter-coordination as well as new fields and foci of action (Lillie and Martinez Lucio, 2012; Sarkar and Kuruvilla,

2020), alliances need to *fuel* themselves with multiple poles of upward, downward and lateral influences (Routledge and Cumbers, 2009), actions and knowledge, across different levels (Marginson and Sisson, 2004). Maximizing the depth and fluidity of these connections is the only way to provide union alliances, such as the one under study, with vital "shared meanings" (Tarrow, 2011) or a "common agenda" (Tattersall, 2010; 2018), to deepen knowledge-sharing processes and to allow the associational power (Wright, 2000) they underlie to survive and grow, despite the contingencies they face. More generally, such changes call for a profound decompartmentalization of union work and the inherent and harmful divisions that still exist therein.

A second level of contingencies now relates to the very rapid evolution of the employer's nebulous nature. In this case, the optimal version of the studied alliance would have consisted of keeping its progress in step with the changes taking place within the transnational employer and matching the latter's spatial scope (Marginson, 2016; McCallum, 2013). Moreover, the instability of the corporation and the increasing difficulty, for all participants, including the Canadian Industrial Union, in accessing the corporation's decision-making center made it more complicated for the participants to develop joint action strategies. Participating in the alliance ended up being seen by some members and local union representatives, who could not take part in the exchanges, as a privilege, a kind of *union tourism*, rather than a necessary contribution to the building of an overarching community of coping. Following his non-re-election, one Canadian local unionist decried the fact that "*it was always the same people who participated in the trips and interacted among themselves* [making it difficult to transfer knowledge and ensure the next generation's involvement in the project and institutionalize its survival]" (Interview no. 45, personal communication, 2007, November 11th). Without this legitimation, the project ended up costing the local leaders most heavily involved in the alliance their positions, simply because they were not able to justify their involvement to their members and faced highly repressive tactics deployed by their local corporative counterparts, such as through the proliferation of yellow unions or new competing union teams at their workplaces. In Peru, such upheavals meant that relationships of trust that had taken years to forge had

to be rebuilt. The process was quite threatening for local unionists, who were only elected for a 2-year mandate. This explains, in part, why trade unions in Latin America retreated on a subregional basis, making it easier to develop common strategies. Following the alliance's retreat, the Southern unions decided to continue exchanging information among themselves. A similar withdrawal was also observed in Quebec, where the local affiliates of the Industrial Union returned to their initial routines. The leaders of the Industrial Union were also severely criticized for their lack of leadership within the alliance and their inability over the years to deliver concrete local results on the ground. Such subregional withdrawals confirm the heterogeneity of the North and South, and the non-existence of what one might be tempted to call the Global North or Global South (Lindell, 2009; Silva, 2013a).

These volatile positions reaffirm the need to multiply mediating and coordinating nodes and/or bodies, such as, but not solely, the Canadian Industrial Union, and to install disciplined dialogue when interests diverge among participants in order to maximize the "actionability" of the associational power at play (McCallum, 2013). Nevertheless, like Marginson (2016), we do not support the idea that such alliances necessarily gain from developing within highly structured institutional, hierarchical and vertical frameworks on a transnational basis, which is anyway not the case in the Americas. Those institutional solutions do not necessarily guarantee the future of this type of initiative, much less the decision of actors to espouse it (Bieler and Erne, 2015). Global Union Federations are certainly in a better position to pick up the threads of the frayed networks and loosely coordinate them. By extension, our study also implicitly questions the viability of initiatives that are supposed to apply models of union efficiency in the North to the realities of the South, without validating them beforehand in democratic terms (Silva, 2013a).

Lastly, these challenges bring out a third level of contingencies, this time linked to the need to act across scales (Hochstetler *et al.*, 2013; Lindell, 2009) with the local and global being interconnected, mutually co-constructing rather than opposing one another, as is nevertheless often the case. The tensions emerging from these contingencies can be seen in the difficulty, for the trade unions involved, in bringing out strong connec-

tions between the actions pursued at the local level and the global demands put forward by the alliance, without, however, overlooking the local dynamics. In our case, conciliating local and global priorities turned out to be all the more contentious for the unions involved since the alliance had, over the years, brought together a growing diversity of inevitably heterogeneous actors. Indirectly, this local-global distancing appeared to have undermined the trust capital and associational power (Wright, 2000) that had been tentatively created within the alliance. In fact, it intensified the dissimilar paths and asymmetries of power and resources between the North and South (Spalding, 2013), rather than creating unifying bonds around common strategies. The accounts collected herein confirm that, although capitalist globalization appears to be calling for trade unions to act transnationally, it should be understood that any transnational alliance must continue to focus on its local bases, without which it will have to take on substance, legitimacy and justification with regard to its members, to whom it is accountable (Dufour and Hege, 2010; 2013; Fox-Hodess, 2020). This result shows that trade union participation at the transnational level remains a deeply relational phenomenon, not only grounded in the exchanges between actors, but also in the local and national realities within which they are situated (Silva, 2013b). It also reiterates the need to keep local foundations at the center of any alliance-building process, especially for the trade unionists promoting it.

Conclusions

Though this study, our aim was to gain insight into how and under what conditions a North-South trade union alliance could bring together a diversity of actors. Within this framework, three levels of constraints were identified, complexifying the opportunities for a heterogeneous group of actors to work together. At the sectorial level, the possibilities of making the alliance work and sustainable were hindered by the employer's instability over the years. Within that context, the alliance participants, despite their a priori enviable spatially fixed location within the production chain (Wright, 2000), found it increasingly difficult to identify who their common employer was. The absence of such identity markers had the effect of ossifying the internal dynamics of the alliance

under study. The situation led the employer to make full use of coercive comparisons, forcing the production sites to compete with one another, and made the North-South rapprochement more complex as well as fueled the fears sown by the anti-union repression underway in Chile and Peru. These shortcomings consequently prompted the participating actors to withdraw subregionally in order to achieve concrete results and strengthen trade union action through the sharing of information and expertise.

These findings apply to both the North and South and provide important conclusions on two levels. Identity markers continue to be the basis for any evaluation and calculation of the costs and benefits of collective action, prior to engaging in it (Hunt and Benford, 2012; Melucci, 1995). Trade union transnationalization must take into account, first and foremost, what trade unionism is, i.e., a process of defending local interests and identities. In that sense, the strength of the alliance, and the trade union participation in it, lies in the solidity of its local foundations. Furthermore, in the absence of legitimacy for the transnational alliance, such a strategy becomes a threat to the legitimacy of actors on the ground at the local level (Dufour and Hege, 2010; 2013; Fox-Hodess, 2020). These findings run counter to the argument that the global level is always necessary for creating a base at the local level as long as the latter is part of a globalized economic strategy (Silva, 2013a). It is only when trade union representation is strong at the local level that more distant strategic alliances can be supported by strong local representatives. If the latter are weak locally, their contacts at the transnational level will always be seen as privileges.

Similarly, trade unions' volatile positions with regard to transnational solidarity demonstrate that such alliances suffer from a great paradox, since the local union leaders involved are forced to make trade-offs between time spent fostering transnational work and time spent on their own work, leaving themselves vulnerable. This finding reveals that a powerful determinant of a union's capacity to adhere to transnational solidarity and act on that level is linked to a deeply entrenched national leadership and its desire to invest the time and resources needed to legitimize such a file among its affiliates. As such, the North is all the more called on to act as guarantor to the South (Gallin, 1994), which is more fragile in terms of resources, and owing to the virulent anti-union repression that often bears down on representatives and activists. In the same vein, only local leaders with a strong base are in a position to invest time and energy in transnational work, whether that involves spending their own time or shifting resources to it. This is particularly true for leaders who are striving to achieve longer-term goals or launch initiatives that will be slow-burning in terms of the material impact on their members, as opposed to leaders whose unions may see more immediate benefits from transnational solidarity. Arguably, in this case Chilean and Peruvian local and national unions, federations and confederations had much to gain immediately, notably in terms of resources and legitimacy, although as the alliance went into decline, even those organizations had little to gain, hence the deep frustration among their leaders, who complained about their selfish Canadian counterparts.

Last, but not least, this study confirms that the actors' origin, that is, whether they came from the North or South, did not overwhelmingly influence their ability to frame the relevance of participating in a global solidarity process. A trade union's decision to overhaul its repertoire of action at the transnational level and become a relevant "broker of ideas" (Tarrow, 2011) appeared to depend on its ability to inhabit the new space. This finding not only dissolves the analytical relevance of the North-South divide (Hochstetler *et al.*, 2013), but also emphasizes that trade union sensibilities regarding solidarity are relationally and contextually anchored (Morgan and Pulignano, 2020). From that perspective, such sensibilities need to be examined on a case-by-case basis in order to be fully understood. Similarly, the expressions *Global North* and *Global South* appear to us to be overused conceptually. Indeed, they seem fundamentally incorrect, given the plasticity of the union responses in terms of transnational solidarity, which are strongly rooted in space, time and the contingencies of the moment, as well as dependent on the links taking place in the heart of activist work in the field. Such features and findings open up an almost limitless field of possibilities for future research and validation in both the North and South, so as to better comprehend how the moral and political solidarity sought transnationally through union alliances are grounded in the concrete and the real.

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Appendix 1

Table 1: Summary of Interviews Conducted and Origins of Interviewees

Union Concerned	Interviews	Time Frame
(Quebec, Canada)		
Local union 1	Nos. 1-13	2004-2008
	No. 70	2018
Local union 2	Nos. 14-25	2004-2008
	No. 71	2018
Local union 3	Nos. 26-30	2004-2008
	No. 72	2018
Industrial Union	Nos. 31-37	2004-2008
	Nos. 65-69	2017-2018
South (Chile and Peru)		
Local union 4	Nos. 38-43	2005-2008
National union (Chile): Federation no. 1	Nos. 44-47	2005-2008
National federations no. 2 and no. 3 (Chile)	Nos. 48-50	2007-2008
Local union 5	Nos. 51-55	2005-2008
Local union 6	No. 61	2007-2008
National union (Peru): Federation no. 1	Nos. 56-58	2005-2008
National federation no. 2 (Peru)	No. 60	2007-2008
NGO no. 1 and no. 2	Nos. 59, 62	2007-2008
International		
Global Union Federations (GUFs)	Nos. 63-64	2005-2008
	Nos. 73-77	2018
Total: 60 union representatives from 16 different union organizations		

Source: Author's elaboration.

APPENDIX 2

Table 2: Synoptic and Chronological Summary of Data Collection Conducted in the Field

Type of Event and/or Work	Location and Date(s)
Quebec	
Attendance at an interunion meeting of the *CanMin2* production chain *Observation of interunion exchanges*	Montreal, June 7, 2005
Meeting with Chile's Federation no. 1 and Peru's Federation no. 1	Montreal, June 7, 2005
Fieldwork: Interview no. 1	Montreal, August 27, 2005
Interview no. 14	Montreal, August 30, 2005
Chile	
Participation in a union delegation - *Observation of interunion exchanges* - *Tour of a Chilean refinery* - *Tour of a Chilean mine*	Santiago, November 4-6, 2005 Antofagasta, November 7, 2005 Iquique, November 8-10, 2005 Santiago, November 11-12, 2005 Concepción, November 12-14, 2005
Fieldwork: Interview nos. 44 and 46	Santiago, November 11, 2005
Interview no. 38	Antofagasta, November 7, 2005
Interview no. 51	Iquique, November 9, 2005
Interview no. 63	Santiago, November 11, 2005
Quebec	
Fieldwork: Interview no. 2	Montreal, March 13, 2006
Interview nos. 15, 22 and 25	Montreal, March 5, 2006
Interview no. 34	Montreal, March 11, 2006
Attendance at an interunion meeting under *EuroMin* - *Observation of interunion exchanges* - *Tour of refineries*	Montreal, Valleyfield and Contrecœur, March 6-9, 2007
Fieldwork: Interview no. 3	Montreal, March 6, 2007
- *Observation of interunion exchanges*	Ottawa, April 17-19, 2007
Fieldwork: Interview nos. 16 and 18	Valleyfield, August 29, 2007
Chile and Peru	
Fieldwork: Participation in a delegation - *Observation of interunion exchanges* - *Tour of a Peruvian mine*	Lima, October 25-28, 2007 Huaraz, October 28-30, 2007 Lima, October 31 and November 1, 2007 Santiago, November 2-7, 2007 Antofagasta, November 8, 2007 Santiago, November 9-13, 2007 Lima, November 13-17, 2007
Chile	
Fieldwork: Interview nos. 39-41, 43 - *Tour of a refinery* - *Observation of interunion exchanges*	Antofagasta, November 8, 2007
Interview nos. 45 and 47	Santiago, November 11, 2007
Interview no. 48	Santiago, November 7, 2007
Interview nos. 49 and 50	Santiago, November 12, 2007
Peru	
Fieldwork: Interview nos. 52-55 - *Tour of a mine* - *Observation of interunion exchanges*	Huaraz, October 28-30, 2007 Lima, November 17, 2007
Interview no. 61	Lima, November 14, 2007
Interview nos. 56-57	Lima, October 25, 2007
Interview no. 60	Lima, October 25, 2007
Interview no. 59	Lima, October 27, 2007
Interview no. 62	Lima, November 1, 2007
Interview no. 64	Lima, November 14, 2007
Quebec	
Attendance at a meeting under *EuroMin* - *Observation of interunion exchanges*	Drummondville, November 20-23, 2007
Fieldwork: Interview no. 29	Drummondville, November 21, 2007
Interview no. 37	Montreal, December 20, 2007
Interview no. 31	Montreal, January 23, 2008
Fieldwork: Interview nos. 4-14	Montreal, January 29, February 5, 10 and March 18, 2008
Fieldwork: Interview nos. 17, 19-21, 23-24 - *Tour of a refinery* - *Observation of exchanges*	Valleyfield, March 23 and 30, 2008
Interview no. 32	Montreal, April 15, 2008
Interview nos. 35-36	Sainte-Thérèse, April 22 and May 20, 2008
Fieldwork: Interview nos. 26-27, 30 - *Tour of a mine* - *Observation of exchanges*	Nunavut, June 8-12, 2008
Observation of an interunion meeting	Montreal, October 14-15, 2008
Fieldwork: Interview no. 42	Montreal, October 14, 2008
Interview no. 58	Montreal, October 15, 2008
Interview no. 33	Montreal, December 18, 2008
Interview nos. 65-69	Montreal, June 1-6, 2018
Interview nos. 70-72	Montreal, July 17-20, 2018
Switzerland	
Fieldwork: Interview nos. 73-77	Zurich, May 1-3, 2018 Geneva, May 3-6, 2018
- *Attendance at a EuroMin shareholders' annual meeting*	Zurich, May 1-2, 2018

Source: Author's elaboration.

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APPENDIX 3

Table 3: Overview of the Features of the Institutional Frameworks Specific to the Unions in the Coalition Studied

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	Quebec	*Chile*	*Peru*
Structure of labor relations	- Decentralized	- Decentralized	- Decentralized
		- Centralized on the basis of a consensus between parties	- Centralized on the basis of a consensus between parties
Union	- In the industry concerning us, the union local has the lead role in collective bargaining	- Lead role exclusively for the company union local (4 configurations are permitted: 1- workplace, 2- intercompany, 3- independent [made up of self-employed/contract or temporary workers], 4- ad hoc groups)	- Local, regional or national union (4 union configurations are permitted: 1- workplace, 2- trade, 3- industry or 4- mixed)
Application of the terms of negotiated agreements	- Local: The signed collective agreement applies solely to the salaried employees covered by the certification unit - "Pattern"	- Local: The signed collective agreement applies solely to union members - Regional: In the case of an agreement between the parties - The *employer* may see it that negotiated working conditions apply to non-members	- Local, regional or national, according to the given union organization's purview and collective agreement - At the local level, negotiated working conditions may apply to non-members, if the union includes the majority of salaried employees in its ranks
Conditions for forming a union	- 50% + 1 of salaried workers must sign a membership card to become part of a bargaining unit; should that absolute majority be reached, certification will be awarded	- At least 8 workers if the workplace has less than 50 - At least 50 workers in the case of "industry" unions - No minimum required for companies with over 250 employees	- At least 20 member workers for the union to be recognized as the *legal bargaining agent* within the company - A minimum of 50 required for "industry" unions
Monopoly of union representation (or not)	- Union monism: The existing union local is given the monopoly of representation and negotiation	- No monopoly of representation within a workplace is given	- No monopoly of representation within a workplace is given
Protections for union activities	- Multiple protections enshrined in the Quebec *Labour Code* and the Quebec *Charter of Human Rights and Freedoms* - Protections for union activities at all times	- In the case of union elections: Firings prohibited in the 10 days prior to the vote taking place and the 40 days subsequent to it - Protection in effect for the duration of the union mandate - Protection for 6 months following a non-election, as applicable	- In the case of union elections: 30 days prior to the vote taking place and 30 days following that date - Protection in effect for the duration of the union mandate and for 3 months following a non-election, as applicable - Formation of a union: From the submission of the request until 3 months following certification
Collective bargaining	- Duty for parties to bargain in *good faith* - Maximum time limit for bargaining: none - Union can assert its right to negotiate in the 90 days preceding the termination date of the collective agreement - Formal, statutory prohibition for firing union leaders because of union activities	- No duty for parties to bargain in *good faith* - Maximum time limit for bargaining: 45 days - Union can assert its right to negotiate from the 45th day preceding the termination date of the collective agreement to the 40th day subsequent to it - Salaried employees may open negotiations on an individual basis as of the 16th day of such negotiations - Firing union negotiators is forbidden until 30 days following the closure of talks	- Duty for parties to bargain in *good faith* - Maximum time limit for bargaining: none - Union may not assert its right to negotiate prior to the 60th calendar day preceding the termination date of the collective agreement currently in effect or subsequent to the 30th day following it - Firing union negotiators is forbidden until 3 months (90 days) following the closure of talks
Strikes/disputes	- The right to strike is acquired on the 90th day following the opening of negotiations should those negotiations be deemed to have broken down - *The employer* is legally prohibited from hiring strikebreakers during the entire duration of a labor dispute (specific to Quebec, does not apply in the rest of Canada) - Striking is prohibited for the duration of the collective agreement	- The right to strike pertains only to the private sector; it is prohibited in the public sector (as is, incidentally, collective bargaining) - The firing of strikers is costly, but is not legally prohibited under the *Labor Code* - Legal provisions for firing union leaders are available - Hiring strikebreakers is possible, under certain conditions (including indexing salaries to the cost of living) - Striking is prohibited for the duration of the collective agreement	- The right to strike is allowed in every economic sector - Legal provisions for firing union leaders are available under the *Law of Productivity and Labor Competitiveness* - *The employer* is legally prohibited from hiring strikebreakers during the entire duration of a labor dispute; certain production operations may continue to go on based on their importance to the company's survival - Striking is prohibited for the duration of the collective agreement

Source: Author's elaboration based upon Quebec Labour Code, Chilean Labour Code and Peruvain Collective Relations and Labour Law.

APPENDIX 4

Table 4. Synoptic and Chronological Summary of Findings

Phases of Development of the North-South Trade Union Alliance Under Study	Phase 1: Growth and Integration	Phase 2: Expansion and Consolidation	Phase 3: Disintegration, Withdrawal, and Tentative Resurgence
Name of company targeted by the alliance under study	CanMin1	CanMin2	EuroMin
Period under study	1990-2004	2005-2006	2007-2008, 2018
Common interest or community of risks and fate (*we-ness*)	- Premises for the creation of a community of union action of transnational scope equivalent to that of the employer. - Leitmotiv uniting the participating unions: *All CanMin1 workers were in the same boat.* - Major strategic alignment being established among the participants.	- Concrete beginnings of the creation of a community of union action of transnational scope equivalent to that of the employer. - Gradual emergence of an increasingly close-knit community of action.	- Breakdown in the cross-cutting identity markers which, until then, had been nurtured among the participants. - 10-year period of stagnation. Attempts to make the alliance re-emerge in 2018. A new period of latency has remained ever since.
Alterity (identity of the employer)	- Clear and easily identifiable. - On the union level, easily understood ideational resource.	- As in Phase 1, clear and easily identifiable. - On the union level, easily understood ideational resource.	- Employer's identity is more difficult to grasp, making the project underlying the alliance increasingly elusive and uncertain. - Unclear ideational resource that is difficult to understand.
Project	- Nurture interunion exchanges, develop joint action and counter the coercive comparisons used by the employer to improve working conditions for all workers throughout the entire production chain.	- Systematizing exchanges (e.g., the main issues at stake in various production points within the multinational company) and resources (e.g., expertise and collective agreements) on an interunion basis transnationally.	- Not clearly defined. Increased insurgencies from unions in the North, since the alliance is considered as having no purpose and merely amounting to union tourism. - Increased internal criticism from unions in the South over the alliance's lack of direction, viewed as inspired by Northern protectionism disguised as transnationalism.
Project's intended scale	- Acting on the transnational level is increasingly the aim.	- Acting on the transnational level is clearly the aim: the goal to be achieved is to systematize its benefits on the interunion level.	- Participating unions in both the North and South seriously question whether the ideals underlying the alliance are really those of transnational solidarity. - Strategic withdrawal on a subregional basis for unions from the South and North, spelling the end of the alliance studied.
Union participation	- Emerging, but strong, in both the North and South. - Reluctance of CanMin1 to host the Canadian delegation of unionists in Chile becomes an incentive that heightens the participants' desire to further nurture the exchanges and develop joint action. - Despite the disparities in resources between the North and South, a synergy of interests and closer coordination of actions is being established.	- Strong in both the North and South: increasing contacts between the participants broaden their respective aims in regard to the need to transcend the boundaries of their immediate sphere of action and collaborate with one another. - Such participation is made possible through the regular investment of resources (human and economic) by the Industrial Union in Canada and the prioritization of the alliance within its internal structure.	- In sharp decline in both the North and South. - The retirement of the international project manager in the Industrial Union in Canada and the removal of the group of leaders most heavily involved in the alliance (in both the North and South) exacerbate the differences between the relative power and interests of the Canadian unions and their Southern counterparts.

Source: Author's elaboration.