

# **Public Sector Unions' Ideas about Employee-Driven Development: Restricted Conceptualization of Representative Participation in Workplaces**

## **Abstract**

*This article explores unions' ideas about representative participation in employee-driven development in the Norwegian public sector, using key documents from two unions for professionals and one general union. By means of qualitative ideational analysis, the article finds that none of the unions clearly convey ideas linking representative participation to knowledge-based, employee-driven development, and the article argues that the potential for employee participation is not fully developed by these unions in the Norwegian public sector. Further, the analysis reveals differences between the unions in whether they describe their local representatives as a collective professional voice. This finding transcends the traditional division between professional associations and general unions, and raises new questions about the role of professional autonomy and knowledge in relation to representative participation and workplace development.*

## **Keywords**

Employee participation, employee representatives, professional knowledge, public sector unions, workplace development

## Introduction

Employees' knowledge and skills are increasingly recognized as a key resource for development and innovation in organizations (Hansen et al., 2017; Høyrup, 2010). This article investigates how unions in the public sector relate to this issue. Common explanations for the lack of democratic employee participation in workplaces typically highlight governance trends, such as New Public Management (NPM), and new forms of employer or management strategies (e.g., Caraker et al., 2016). Another perspective on the role of unions in contemporary societies argues that the influence of unions is fundamentally dependent on how they engage in a “battle of ideas” (George, 1997; Hyman and Gumbrell-McCormick, 2010), and specifically focuses on union strategies related to employee representation and participation (Hyman, 1997). Building on this latter view, this article studies dominant ideas about the role of employee representatives in workplace development as conveyed in key union documents by three different unions in the Norwegian public sector.

Previous research has investigated trade unions for professionals' strategies related to knowledge work and professional development, documenting how unions in Nordic countries take on increasingly proactive roles related to policy development and professional quality at the national level (e.g., Lilja, 2014; Mausestagen, 2013; Nerland and Karseth, 2015).

However, aspects of the role of local union representatives related to knowledge work have not yet been studied. International research on the global decline of unions and on different ways to renew and strengthen the trade union movement has highlighted the “partnership” between employers and employees at different levels as one available strategy (e.g., Frege and Kelly, 2004; Hyman, 2002). In addition, from the field of management studies, it has been documented that union representatives can act as change agents (Butler and Tregaskis, 2018; Hansen et al., 2017). However, theoretical deliberations on the agenda of collective representation (e.g., Hyman, 1997) and research on the outcome of workplace partnerships

(e.g., Saridakis et al., 2017) tend to exclude aspects specifically related to the employees' professional knowledge. Exceptions can be found, for instance, in the education sector, in which there is ongoing debate about union renewal, with teachers' unions depicted as key players in developing the quality of public education, both nationally and locally (e.g., Bangs and McBeath, 2012; Johnson et al., 2009; Stevenson and Gilliland, 2015). However, this research does not elaborate on the implications for employee representation and employment relations at the local level. The literature on the Nordic work-life model thoroughly examines local cooperation between employers and employees as a means to enhance productivity and innovation in private industries (e.g., Hernes, 2006; Levin et al., 2012; Nielsen et al., 2012; Trygstad et al., 2015), and even addresses tripartite cooperation in municipalities (Moland, 2017). However, unions for professionals are generally less researched than general unions (Messel, 2009), and the issue of knowledge-based development seems underdeveloped in relation to bipartite cooperation in public sector workplaces. Previous research on employee participation has suggested that unions' demands for codetermination on overall strategic questions have been dissipating for a long time (Caraker, 2016), and that employee participation typically relates to operational rather than tactical and strategic decisions (Knudsen et al. 2011, Knudsen, 1995). However, little is known about whether and how this is related to dominant ideas among unions, nor how unions conceive of the relationship between representative participation and knowledge-based workplace development.

In the European context, Norway is an interesting case to study, as employment relations are characterized by stability and well-functioning cooperation between employers and employees at national and local levels. Moreover, the international trend of declining union membership is still modest in Norway, and almost nonexistent in the public sector. Employees join a union individually and voluntarily, with strong unions and union traditions ensuring an organizational density of about 80% in the Norwegian public sector; further, most workplaces

have elected employee representatives (Falkum et al., 2009). The public sector is characterized by knowledge-intensive work, and several of the sector's unions act as professional associations, e.g., for physicians or teachers, alongside their role as unions. As such, the Norwegian public sector represents a relevant case for studying how presumably strong unions, with different degrees of professional aspiration, conceive of workplace democracy in relation to their members' knowledge and skills.

The institutionalized cooperation between employers and employees is regulated by collective agreements known as Basic Agreement(s).<sup>i</sup> The intention of the agreements is to facilitate cooperation between the work life partners at all levels. Employees are given the right and duty to contribute to the development of quality in services—both individually and through arrangements with elected representatives (Basic Agreement KS, 2016: 8; Basic Agreement Spekter, 2013: §28–29). This entails a joint obligation on the part of management, employees, and their union representatives to take initiatives and actively engage in cooperation for development (Hagen and Trygstad, 2009). The Nordic case has been highlighted as an example at the forefront of employee participation in workplace innovation (Payne, 2017); however, the private and public sectors seem to represent somewhat different traditions. In the Norwegian private sector, workplace democracy and cooperation are generally associated with innovation and productivity (e.g., Heiret, 2007; Levin et al., 2012). Conversely, arrangements for representative participation and codetermination in public sector workplaces are more narrowly associated with the bargaining of wages and working conditions and attempts to halt or obstruct changes and reforms (Hagen and Pape, 1997: 34; Michelsen, 2007: 142–148; Norwegian Public Report, 2016: 185-186). Accordingly, there seems to be a gap between the intention of the Basic Agreement(s) and the realities of workplace cooperation in the Norwegian public sector. The Norwegian institutions for employee participation were developed during the 1970s, a period marked by a political emphasis on

democracy and participation. From the 1980s, NPM reforms increasingly influenced the public sector, productivity was highlighted at the expense of democracy, and increased attention was given to direct participation through individual employees at the expense of representative participation (Hagen and Pape, 1997: 33-34; Heiret, 2012: 59). Still, these developments were weaker in Nordic countries compared to most of Europe and, in the Norwegian context, direct and representative participation are still closely related and are even considered mutually reinforcing (Hagen and Trygstad, 2009; Knudsen et al., 2011). Against this background, it is relevant to investigate the ideas of Norwegian public sector unions in order to explore how they utilize the potential for employee participation.

The cases chosen for this study are the Norwegian Medical Association (NMA), the Union of Education Norway (UEN), and the Norwegian Union of Municipal and General Employees (NUMGE). These are all large, influential unions in the Norwegian public sector but represent three distinct union traditions in the Norwegian context, ranging from strong professionalism to typical unionism. The empirical data consisted of union documents that were selected because they were expected to contain the unions' key ideas about workplace democracy and the role of employee representatives in the workplace. Ideational analysis was applied to explore how the gap between the possibilities and realities of employee participation may be related to the way in which public sector unions conceptualize representative participation. The exploration recognized that the ideas contained in the selected union documents did not necessarily reflect everyday practice; however, the study was motivated by the constructivist assumption that ideas influence meaning-making, shape attitudes, and, eventually, prompt action (Hay, 2010).

The following research questions guided the inquiry: (1) What ideas about representative participation in employee-driven development do public sector unions convey? (2) What are the prominent similarities and differences between unions on this issue, and how can they be

interpreted? The paper is structured as follows: First, the ideational dimensions and sensitizing concepts guiding the analysis are presented. Next, the methodological approach and data analysis process are described, after which the findings are presented and explored. In conclusion, it is argued that the union documents under study contain restricted conceptualizations of representative participation in workplaces, and that the potential for employee participation and workplace democracy may be stunted rather than fully developed by unions in the Norwegian public sector. Moreover, the revealed differences between the unions show that professional autonomy and knowledge are relevant aspects in studies of representative participation.

## Ideational dimensions

In this study, the term *ideational analysis* was used to refer to an interpretive, systematic, and qualitative analysis of ideas in political texts. The approach constitutes a middle ground between content analysis and discourse analysis and is based on an interplay between deductive and inductive approaches (Bratberg, 2017; Beckman, 2005). Here, ideas are understood as thought constructions that serve as frameworks or cognitive filters by which our perception of the world is influenced, and analysis is based on the constructivist assumption that ideas shape actors' perceptions about what is feasible, legitimate, possible, and desirable, thereby influencing meaning-making, attitudes, and human action (Hay, 2010; Lakoff, 2004). Accordingly, this article aims to identify and analyze ideas in texts. Such ideas should not be conflated with everyday practice or taken as evidence of how things really are. Rather, in this context, ideas are analytical tools for assessing how unions conceptualize representative participation in relation to development work. The conceptual framework consists of ideational dimensions inspired by the definition of employee-driven innovation (EDI). The EDI concept was developed by researchers as part of the more recent emphasis on innovation as an ongoing process in societies and workplaces. In this article, it is introduced to highlight

the role and potential of employees in innovation and development processes (for a short introduction, see Høystrup, 2010). The concept is new, but the idea itself is not. In Norwegian work-life research, such employee involvement in development processes can be traced back to the 1950s. Today, the concept of EDI is included in the main Basic Agreement between work-life partners in the private sector (Hansen et al., 2017), and workplace cooperation for development is considered a key component of the so-called “Norwegian micro-model” (Hernes, 2006). The EDI concept is less integrated in discourses on public sector development, and, generally, the term *innovation* seems foreign to many employees in public sector welfare. Consequently, this article uses the term *employee-driven development* as an analogue for EDI. Thus, employee-driven development refers to the introduction of something new and useful, such as methods, practices, or services, that increases the quality and/or effectiveness of work. Changes can be incremental or radical, and the drivers of innovation/development are the expertise, knowledge, and skills of the employees. Employee-driven development is primarily a bottom-up process, and employees, employee representatives, and leadership comprise the important players in this process (Høystrup, 2010). Inspired by this definition, and building on previous research on employee participation, the conceptual framework contains ideational dimensions capturing (1) democracy and productivity as normative justifications for employee participation, (2) direct and representative employee participation as different means of exerting influence, (3) wages and working conditions as well as professional knowledge and skills as union issues, and (4) reactive and proactive involvement, relating to different phases in the chain of decisions. An outline of the four dimensions is presented below.

Historically, the institutions for industrial democracy in Norwegian working life were established with a two-sided normative justification, as employee participation and codetermination would secure democratic rights while increasing productivity (Heiret, 2012:

55; Knudsen, 1995<sup>ii</sup>). In the public sector, increased productivity may be understood as the effective use of resources related to enhanced quality and/or reduced spending in the services provided to citizens. Innovation is often related to such increased economic value, and employee-driven development tends to be seen primarily in relation to productivity. However, it has also been argued that employee-driven development entails a democratization of innovation processes (Hansen et al., 2017). Moreover, employee participation and workplace democracy creates value in terms of increased welfare and motivation among employees (Knudsen et al., 2011). The document analysis targeted the unions' justification for employee participation, using *democracy* and *productivity* as the underlying concepts of the first ideational dimension.

Individual employees and elected employee representatives are important stakeholders in employee-driven development, and as such the second ideational dimension relates to employee participation using *direct* and *representative* as underlying concepts. Direct participation refers to individual employees' ability to influence their own work situation, such as task performance at the operational level. Representative participation is exercised indirectly through elected representatives and is intended to give employees influence at a tactical or strategic level in relation to goals, organization, and long-term development (Hagen and Trygstad, 2009; Knudsen, 1995). Traditionally, representative participation has been linked to democratic values and distribution of power, whereas direct participation has been linked to instrumental, management-driven logics of increased productivity and innovation. In the Norwegian context, this distinction is less valid, as both forms of participation tend to exist side by side, and direct and representative forms of participation are increasingly seen as mutually dependent and even mutually reinforcing in the workplace (Hagen and Trygstad, 2009; Knudsen et al., 2011; Trygstad et al., 2015). Employee-driven development involves



both forms of participation, but the analysis paid specific attention to the unions' ideas about representative participation because it specifically relates to tactical and strategic decisions.

The expertise, knowledge, and skills of employees are the drivers in employee-driven development and, accordingly, are a key union issue. Historically, unions began to organize the interests of workers within the same occupation or profession. Most unions for professionals are still organized on the basis of this principle, whereas general unions organize members across different occupations. Approaches considering professional and trade union strategies as alternatives or as mutually exclusive have rightfully been rejected as too simplistic (e.g., Fauske, 1991; Grove and Michelsen, 2014: 345). Hence, the analysis instead investigated how the different unions conceptualize their members' knowledge and skills. The Norwegian tradition of workplace cooperation consists of both formal negotiations, which are often related to wages and working conditions, and more practical and long-term cooperation for development (Hernes, 2006). The first component has been well established as a responsibility for elected representatives; however, it is the latter component that implies knowledge-based workplace development. The third ideational dimension thus makes an analytic distinction between union issues narrowly related to *wages and working conditions* and issues related to members' *professional knowledge and skills*. Increased productivity could be related to both, but knowledge-based, employee-driven development is most clearly related to the latter.

The fourth ideational dimension is related to timing and distinguishes between *reactive* and *proactive* participation in the workplace (Knudsen, 1995). Certain management practices will promote employee participation in an organization (Butler and Tregaskis, 2018; Hansen et al., 2017); however, the strategies and ideas forwarded by unions and their representatives are equally important. As previously described, the Basic Agreement(s) gives employee representatives the right and duty to engage in workplace cooperation aimed at developing the

quality of public services. Participation in early phases of the chain of decisions, such as the planning phase, is more proactive and yields influence over more strategic issues than participation in the implementation phase (Knudsen, 1995). At the national level, it has been argued that unions “may take a proactive position as a knowledge agent striving to advance upcoming trends and requests, or a more reactive position as a community that seeks to reply to current demands in an adequate manner” (Karseth and Nerland, 2007: 337). The same distinction can be made between reactive and proactive participation in the workplace, where employee representatives may be expected to resist changes that might conflict with professional or vocational standards, and/or be encouraged to initiate development. As employee-driven development is primarily a bottom-up process anchored in employees’ knowledge and skills, this ideational dimension encompasses whether employee representatives are expected to merely react to changes initiated from the top-down or to initiate bottom-up development.

The conceptual framework with the ideational dimensions is summarized in Table 1 below. The inquiry that follows will investigate union documents for dominant ideas related to employee-driven development, specifically targeting how representative participation is conceptualized in relation to other ideas.

Table 1. Conceptual framework

<b>Ideational dimension</b>	<b>Underlying analytical concepts</b>	<b>Operationalization</b>
<b>Normative justification for employee participation</b>	<i>Democracy</i>	<i>Employee participation is seen as a democratic right and as strengthening workplace democracy</i>

	<i>Productivity</i>	<i>Employee participation is seen as a contribution to increased productivity (quality) and development</i>
<b>Employee participation</b>	<i>Direct</i>	<i>Refers to individual employees' ability to influence their own work at the operational level</i>
	<i>Representative</i>	<i>Refers to elected representatives' influence on tactical and strategic decisions</i>
<b>Union issues</b>	<i>Wages and working conditions</i>	<i>Issues narrowly related to the employees' wages and working conditions</i>
	<i>Professional knowledge and skills</i>	<i>Issues related to the knowledge and skills of employees</i>
<b>Timing</b>	<i>Reactive</i>	<i>When unions react to initiatives originating primarily from the top-down, typically related to the implementation phase of decisions</i>
	<i>Proactive</i>	<i>When unions initiate development in the workplace, from the bottom-up, and/or engage in the planning phase of decisions</i>

## Data and methods

The cases subject to examination in this article are the Norwegian Medical Association (NMA), the Union of Education Norway (UEN), and the Norwegian Union of Municipal and General Employees (NUMGE). The unions were chosen based on their relevance, as they are large and influential in the Norwegian public sector and belong to three different union confederations representing three different types of unions in Norway. Specifically, these cases enabled a comparison of unions with different degrees of professionalization. The NMA is a trade union and classical professional association for physicians, with approximately 33,860 members constituting almost 96% of all practicing physicians in Norway. It is also a member of the Federation of Norwegian Professional Associations (*Akademikerne*). The UEN organizes teachers at all levels of the education system, from pre-school to university. The union has over 170,000 members, constituting an organizational membership of around 80% of all school teachers. The UEN explicitly identifies as both a union and a professional association and is the biggest affiliate in the Confederation of Unions for Professionals (Unio). As is typical in Norway, most of these physicians and teachers work with public welfare services, and membership in both unions requires higher education. The NUMGE, with more than 355,000 members, is the largest union in Norway and belongs to the Norwegian Confederation of Trade Unions (LO). It is a general and vertically organized union, encompassing both blue- and white-collar workers. Membership is not dependent on a level or field of education. Most of its members work for municipalities in roles typically related to welfare services.

The three unions may be placed on a continuum, with the NMA, as a typical professional association, at one end; the NUMGE, as a typical trade union, at the other; and the UEN in the center. The organizations have representative structures comprising union representatives at

national, regional, and local levels. The employee representatives elected in the workplace were subject to analysis in this study, as they represent the other union members in their daily work and have rights and duties in bipartite workplace cooperation in line with the regulations of the Basic Agreement(s).

The data material selected for this study consisted of two different types of primary sources from each of the three unions: *the key policy document*, adopted by the unions' national congresses and synthesizing the unions' main principles, values, and political priorities for the present congressional period (NMA, 2015; NUMGE, 2013; UEN, 2016), and *the handbook for elected representatives*, which provides guidance to the representatives on how to fulfill their roles in the workplace (NMA, 2009; NUMGE, 2015; UEN, 2017). See Appendix 1 for an overview of the data. Together, these two sources from each union were considered vital for understanding how the unions conceptualize and operationalize union policies for employee participation, as the policy documents typically describe central goals and strategies for the union, whereas the handbooks operationalize the representatives' roles through work guidelines. The documents vary in scope and level of detail; nevertheless, as they belong to relatively fixed genres of union documents, they were useful for comparison. The three cases were compared to identify similarities and differences (Ragin, 1994) and to single out the key characteristics of each union in order to identify new questions. As such, the comparative approach used in this study may be understood as both descriptive and heuristic (Kocka, 2003: 40), with an explorative purpose.

The ideational analysis was undertaken as a thematic analysis, with the ideational dimensions and their underlying concepts representing the main themes. The reading of the texts was inspired by Blumer's (1954) concept of sensitivity—that is, the dimensions were not applied as fixed categories but rather guided the reading and analysis in an interplay between inductive and deductive approaches, as the concepts were modified during each reading of the

texts. The analytical concepts served as “sensitizing concepts” insofar as they conveyed a general sense of reference and guidance in approaching the empirical material (Blumer, 1954: 7). In the process of reading for ideas, the analytical concepts contributed by “translating” significant ideas expressed by the unions into theoretical concepts applied in the research field. In the first step of the analysis, the prevalence of specific ideas in the documents was detected in light of the ideational dimensions and their operationalization. The second step involved rereading the texts to examine how the different ideational dimensions were interconnected to display ideas about representative participation in employee-driven development. In the final step, similarities, differences, and key findings were identified by comparing the three unions. Table 2 summarizes the steps of analysis as well as the empirical research questions.

Table 2. Steps of analysis

	<b>Aim</b>	<b>Analytical approach</b>	<b>Empirical research question</b>
Step 1	Detect key ideas	Ideational dimensions as sensitizing concepts	Which ideas are conveyed in the texts? Which ideas are not conveyed?
Step 2	Explore how the ideas are interconnected	Conceptual framework guiding interpretation	How do the unions relate to employee-driven development?
Step 3	Comparing and exploring the findings	Descriptive and heuristic comparison	What are the key characteristics and main differences and similarities between the unions?

## Findings<sup>iii</sup>

In this section, the findings are presented, union by union. For each union, the findings in the policy documents are presented first, followed by the findings in the handbooks and a short reflection on how the two documents are related to each other. Thereafter, the unions are compared based on the ideational dimensions presented in Table 1.

### The Norwegian Medical Association (NMA)

The NMA policy document unambiguously positions the union as a professional association and clearly expresses proactive strategies for continuous professional development within all aspects of the medical sector, stating, “Professionals, in both local and central competence environments, must be involved to achieve better decisions and results” (NMA, 2015: 2), and adding that “those who work close to the patients must have greater influence on the development of the health services” (2015: 4). In a paragraph dealing specifically with research, education, and development, the document highlights that “all physicians should be allowed more time for knowledge sharing and improvement work” (2015: 5). Employee participation and development in the workplace are thus clearly, proactively voiced in the policy document; however, the ideas the document conveys imply direct rather than representative participation from the employees as the means of influence. The stated aim of the NMA is to secure the “professional, social, and financial interests” of its members (2015: 1), and professional knowledge is highlighted throughout the policy document. Wages and working conditions are addressed only indirectly in relation to the aim of recruiting and retaining physicians, and the normative justification for employee participation seems more clearly related to productivity than to democracy, as the document advocates for quality health services rather than employees’ democratic influence. Generally, the policy documents do not conceptualize representative participation or address the role of employee representatives in workplaces.

The NMA handbook for employee representatives does not relate the role of the union representatives in the workplace to the proactive, professional policies expressed in the association's policy documents. The handbook provides employee representatives with information about the work of the NMA and their own role as union representatives (NMA, 2009: 1). Their mandate is described with reference to the Basic Agreement(s), yet their role is largely reduced to questions regarding members' wages and working conditions. According to the handbook, the employee representatives have the right and duty "to discuss/negotiate questions concerning wages and working conditions" and "to ensure that rights and duties are retained in accordance with current tariff agreements" (2009: 5). This rather narrow description seems to exclude professional issues from representative participation. Generally, the ideas conveyed in the handbook are reactive in relation to development work and relate to members' roles as workers and not professionals. The NMA's strategy seems to imply a division of responsibilities, with the national organizational bodies serving as the professional voice, while employee representatives in workplaces are restricted to acting merely as advocates for better wages and working conditions for members. Although the value of dialogue and cooperation between workplace partners is highlighted, solving problems seems to be more salient than initiating development, and there appears to be an implicit understanding that changes will be initiated on a top-down basis. A subsection on restructuring initiated by employers expresses that the employee representatives are expected to be both proactive and professional representatives (2009: 37-38). Yet, professional representation is not articulated as a general expectation for workplace representatives. Thus, the proactive orientation toward knowledge and change evident in the policy paper is not conceptualized or operationalized in the handbook for employee representatives.



## The Union of Education Norway (UEN)

The values and principles of the UEN are conveyed in proactive terms, and its policy document contains a strong sense of social responsibility (UEN, 2016: 4–7). The role of employee representatives and the collective basis of codetermination and cooperation are highlighted as key principles along with the value of “active and engaged members” (2016: 4–5). As such, both direct and representative employee participation are clearly advocated. The justification for such influence is mainly tied to increased quality, and thereby productivity, following from professional judgments (2016: 22–23), but the normative justification is also related to democracy. The stated aims in the policy document relate clearly to both kinds of union issues, as the aim is to “maintain the members’ interests when it comes to wages and working conditions and when it comes to professional and educational political issues” (2016: 4). A separate section in the policy document deals with “governance, leadership, and cooperation between the partners” (2016: 21–26). This section underlines that the employee representatives “represent the profession [...] both on issues of professional character and on other matters related to the employees’ working conditions” (2016: 22). The dual role of the employee representatives is clearly conveyed throughout the document, emphasizing that they should maintain the members’ interests as both workers and professionals. It is also stated that the UEN’s ambition is to make cooperation between leaders and employee representatives “a professional resource” (2016: 22). In order to succeed, the UEN intends to “strengthen and further develop the role of the elected representatives” and “use codetermination and cooperation between the partners more actively” (2016: 25–26). Interestingly, the section of the policy paper focusing more specifically on quality and professional development (2016: 12–19) does not address the role of the employee representatives. Rather, the “professional community” consisting of all teachers and leaders is emphasized in relation to development work (2016: 16). This implies direct participation from professionals rather than

representative participation. Although the employee representatives are briefly mentioned as part of workplace cooperation (2016: 17), their relation to the “professional community” is not elaborated on or clarified in this respect.

The UEN handbook for elected representatives in the workplace describes tasks and expectations and confirms the employee representatives’ dual role (2017: 2). Here it is emphasized that the employee representative is both a “watchdog and agent of change” and is expected to advance professional judgments in cooperation with the employer (2017: 6, 17). Both reactive and proactive participation are voiced; however, more importance is given to solving problems and ensuring the quality of decisions than to initiating development. When describing the role of the employee representative in leading the local union body (*klubben*), the importance of professional discussion is highlighted, but processes to initiate development are not specifically encouraged (2017: 4-5, 24). Accordingly, similar to the policy document, the handbook clearly conveys a proactive attitude toward knowledge-based development work, but no clear distinction is made between direct and representative forms of participation in this respect. Rather, the professional community is emphasized as the key player in professional development work. However, as the local level of the union (*klubben*) does not necessarily include all members of the professional community in the workplace, the role and mandate of the employee representatives on professional issues remain unclear.

#### [The Norwegian Union of Municipal and General Employees \(NUMGE\)](#)

The NUMGE policy document (2013) highlights members’ wages and working conditions as key union issues together with the development of the welfare state. Vocational and professional issues are also raised but receive less emphasis. The document states that the NUMGE will work to strengthen the employee representatives’ rights of codetermination and influence over all relevant issues and to secure employees’ influence over their own work (2013: 20–22), thereby advocating both representative and direct participation. The employee

representatives in workplaces are mentioned throughout the text, but they are not portrayed as representatives regarding professional and vocational issues, and members' knowledge and skills are not highlighted as justifications for employee participation. Normative justification for employee participation is thus related more to democratic rights than to quality and productivity. Nevertheless, the NUMGE expresses its commitment to "initiate good development processes" (2013: 56) and to further develop the quality of public services, connecting this ambition to the tripartite cooperation commonly identified with the Nordic model (2013: 55–59). However, elected representatives in the workplace are not mentioned specifically in this respect, and the continuous reference to tripartite cooperation implies that development work is primarily associated with organizational levels involving three parties, such as the national and municipal levels, rather than the bipartite cooperation characteristic of the workplace level. However, it is recognized that the role of the elected representatives is changing, and that they "must be better equipped to follow development processes and to initiate necessary changes in the workplaces" (2013: 59). This clearly proactive commitment is complemented by the ambition to "increase the competence for change and development at all levels of the organization" (2013: 60), indicating that new ideas may be developing.

According to the NUMGE handbook, elected representatives in the workplace should represent union members in relation to employers on most relevant issues (2015: 6). The handbook emphasizes issues related to wages and working conditions, and the general impression is that workplace representatives are not expected to represent members on vocational and professional issues. The handbook emphasizes development and highlights both direct and representative participation. However, the justification is typically related to democracy and the members' interests rather than to professional quality (2015: 25).

Internally, the NUMGE is organized with four different sections of vocational (*yrkesfaglig*) work as a secondary structure. The responsibility for maintaining the members' professional

interests rests with the vocational sections, but the importance of close cooperation between these vocational sections and workplace representatives is emphasized (2015: 8). The vocational and professional work is nevertheless portrayed primarily as a service offered to members, not as an ambition to exert professional influence in the workplace. This renders the handbooks' ideas about professional and vocational influence merely reactive, as opposed to the general proactive orientation toward change conveyed in the union's policy documents.

### The unions compared

The findings presented above describe dominant ideas conveyed in the union documents and provide suggestions on how the different ideas are interrelated. Comparing the cases reveals intriguing similarities and differences. All three unions clearly view professional and vocational issues as union issues, and all three emphasize employee participation in the workplace. Interestingly, however, the studied union documents display a general lack of ideas linking institutions for representative participation to knowledge and skills utilization and employee-driven development in the workplace.

As expected, related to the first three ideational dimensions, the professional association, NMA, is distinct from the others due to its clear emphasis on professional issues and knowledge, its correspondingly weak focus on union issues and representative participation, and its emphasis on the need to enhance quality of service as the key normative justification for employee participation. Meanwhile, the general union, NUMGE, highlights its role as a union and emphasizes representative employee participation and the democratic right to participation, but it pays less attention to professional and vocational issues. The UEN, on the other hand, represents a middle ground between the two, emphasizing both professional issues and quality as well as democratic union rights, along with both direct and representative employee participation. Common to the three cases is the notion that unions are political actors with an obligation and commitment to influence societal development within their

sectors and beyond. Related to the fourth ideational dimension, one could say that this message is often conveyed in proactive terms, especially in the policy documents. However, such ideas seem to be predominantly related to the national and, to some extent, regional bodies of the organizations. When it comes to the local level, the handbooks for union representatives do not operationalize the proactive, development-oriented union policies or voice expectations related to setting the agenda or being a driving force in development. Conversely, dominant ideas in the handbooks seem to relate the union representatives merely to maintaining members' rights as either employees or professionals. This renders the conveyed ideas about the role of union representatives in the workplace predominantly rights-oriented and reactive—as opposed to professional and proactive. Moreover, the unions differ in the way they relate to professional issues. The NMA clearly voices professional concerns, however, does not convey it as a union issue at the local level. The NUMGE is less explicit on vocational and professional concerns, but emphasizes development as part of the union representatives' responsibility. The teachers' union, the UEN, is the only union in this study to voice clear ambitions for professional influence through local representatives and to emphasize the employee representatives' role in advancing professional judgments in cooperation with the employer. However, the documents relate this more to defending professional standards and preventing harmful changes than to initiating development. Further, the relationship between the employee representative and the professional community in the workplace is not discussed or conveyed clearly, thereby obscuring the role and mandate of the local representative in terms of serving as the collective professional voice.

An unexpected similarity between the cases follows from the fact that both the NMA and the NUMGE implicitly delegate professional and vocational issues to organizational bodies not covered directly by the Basic Agreement(s) or to levels of the organizations involved in tripartite cooperation, whereas wages and working conditions are highlighted as the main

responsibility of representatives in the workplace. As the UEN emphasizes the dual role of the employee representatives, one key distinction between the unions is related to whether they portray their representatives merely as representatives of employees (as seems to be the case with both the NMA and the NUMGE) or as representatives of both professionals and employees (as is clearly the case with the UEN).

## Discussion

In this article, the following research questions were addressed: (1) What ideas about representative participation in employee-driven development do public sector unions convey? (2) What are the prominent similarities and differences between unions on this issue and how can they be interpreted? A general finding in this study is that the unions' commitment to knowledge-based development and renewal seems to be predominantly associated with the organizations' national and, to some extent, regional levels. Union representatives in the workplace are primarily conceptualized as defenders of members' rights. In relation to employee-driven development in the workplace, direct participation from individual employees is more clearly conveyed than representative forms of participation. These findings indicate that the unions are seeking influence over operational decisions rather than advancing the opportunity to exert influence over tactical and strategic issues at the local level. Another key finding is that the unions differ in terms of the degree to which they portray their employee representatives as a collective professional voice. Whereas the professional association, NMA, and the general union, NUMGE, seem to limit the role of employee representatives in the workplace to being responsible for members' wages and working conditions, the UEN clearly includes professional representation and highlights the dual role of its representatives.

Ideational analysis based on key documents may capture dominant ideas in the texts; however, the ideas in the selected documents are not synonymous with ideas carried by actors in the real world. The unions may have ideas, strategies, or cultures that were not captured by the specific documents analyzed nor by the analytical perspectives applied, and the employee representatives' actual workplace roles may in fact surpass what is conveyed in the selected documents. However, the studied documents *do* represent official union policies and guidelines for union representatives and as such provide a valid basis for grasping the dominant ideas held and communicated by the unions.

The contributions of this study are twofold. First, it contributes to a better understanding of the gap between possibilities and realities in workplace cooperation and employee participation in the Norwegian public sector by relating it to the ideas advanced by the unions themselves. As the analysis provided particular insights into which ideas were *not* conveyed, it revealed that the unions do not in fact utilize the potential for knowledge-based, employee-driven development in the workplace. Second, the findings demonstrate that different unions relate to the issue of professional representation in different ways, thereby highlighting *profession* as a relevant dimension for understanding unions without evoking a simplistic divide between professional and general unions. Possible interpretations of the key findings are provided below, starting with the general restricted conceptualization of representative participation in workplaces, common to all the studied unions.

The strong position of many public sector unions, including their role as agents of knowledge in their respective sectors, and Norwegian institutions for work-life cooperation provides a unique and privileged position for exerting influence. However, when the first public sector Basic Agreement was signed in 1980, it was inspired by the institutions and practices in the private sector but relied on a different compromise: Although the partners were considered equal, the employees only gained the right to influence administrative issues, not to interfere

with political decisions (e.g., Heiret, 2012). The seminal work of Læg Reid (1983) clearly expresses the ambiguous character of such a distinction. This compromise might have limited the influence of the unions, as the employers were entitled to decide which issues should be considered political. Moreover, the original distinction between political and administrative issues may have been reproduced as a distinction between strategic and administrative issues, thereby limiting the influence of unions over professional issues in the workplace (Michelsen, 2007). Such a distinction would rest on a rather narrow interpretation of the Basic Agreement(s), as it clearly describes the right and duty of the union representatives to engage in cooperation and involve their members in developing quality, methods, and organization of work (Hagen and Trygstad, 2009).

A related view is that public sector employees and their representatives do not have the same incentives to innovate and contribute to change as employees in private companies because public sector jobs are not directly dependent on productivity (Læg Reid, 1983; Norwegian Public Report, 2016: 186). Although there are some differences between private and public sectors in this respect, such a position underestimates the professional incentives motivating public sector employees. Employees with a professional background are generally more engaged in their work than other types of employees (Knudsen et al., 2011), and public sector employees are particularly motivated to contribute to public benefit and welfare (Caraker et al., 2016). At the national level, cooperation between the partners in the public sector involves issues related to quality and productivity, and the viability of such cooperation has even been documented at the regional level in municipalities (Moland, 2017). Employees in public sector workplaces might not conceive of their contribution in terms of innovation and increased productivity, but they clearly have professional incentives to improve methods, practices, and the organization of work based on their knowledge and skills.



When institutions for representative participation are not forwarded as a means to exert such vocational and professional influence in workplace development, this may be attributable to the governance and leadership trends in the public sector from the 1980s onward. Some of the practices linked to NPM and Human Resource Management (HRM) tend to forward the idea of direct employee participation at the expense of representative participation. Even though this development has been relatively weak in Norway, it is likely that the changes and trends in management practices over the last few decades have influenced union ideas and the contexts in which they seek influence. Furthermore, in the 1980s, a general critique was made of professions and their unions: They were increasingly seen as actors with too much power that advocated for the narrow interests of certain groups and obstructed the necessary renewal and reorganization of welfare services in the public sector (Fauske, 1991: 28; Heiret, 2007: 104). Governmental reforms in Norway in this period were deliberately aimed at weakening the professions' ability to influence strategic decisions in sectors such as health and education (Heiret, 2012: 60). For example, in the education sector, the professional bodies for teachers at the school level (*lærerråd*) were closed in the early 1990s, after it was argued that teachers' participation was secured through the Basic Agreement(s) and specific laws (Larsen, 2015: 113-114). According to the findings in this article, the Basic Agreement(s) is currently not interpreted in a way that fully retains this function.

Factors internal to the unions might also account for the general lack of ideas connecting the unions' aims related to vocational and professional influence with the means available through representative participation. The findings might reflect, for instance, strategic considerations related to resources, the division of power within organizations, or organizational practicability, as local employee representatives—in order to be representative—need significant resources and specific skills to cooperate closely with employers, fellow members, and union bodies. Further, the employee representatives'

legitimacy depends on a real mandate to act on behalf of the other members, which inevitably limits the number of potential employee representatives in a workplace, as the candidates must be commonly regarded as a representative voice.

Accordingly, it seems unlikely that the general restricted conceptualization of representative participation reflects a common intention shared by the unions to forward reactive rather than proactive strategies and to weaken representative institutions by emphasizing direct influence at the expense of representative participation. Rather, the finding might indicate that cooperation between partners in the workplace represents an available source for strengthening knowledge-based, employee-driven development in the public sector. As early as 1991, a report on the role of codetermination highlighted that debates about renewing the Norwegian public sector have not emphasized perspectives related to employees' knowledge as a resource for development, even though this is explicitly expressed as a motivation for employee participation in the Basic Agreement(s) (Bogen, 1991: 38). This article argues that dominant ideas among the unions might contribute to explain the prevailing situation.

The elucidations above relate to common factors influencing all the unions, however, the differences between the unions also deserve closer examination. The findings do not indicate a direct link between how the unions' relate to professional issues in the workplace and their degree of professionalization. Still, the observed differences may be attributed to the unions' diverse organizational traditions, power resources, and professional understandings. Some of the ideational differences between the unions were expected, such as the unions for professionals, the NMA and the UEN, being more concerned with professional issues, while the NUMGE favors union issues and barely voices professional concerns. However, the apparent similarity between the NMA and the NUMGE in terms of not advancing professional issues as a responsibility of local union representatives may also be understood in light of different power resources and traditions and thereby the rationale for collective

organization. Physicians, with a large degree of individual power, have traditionally been less dependent on collective, representative influence than those represented by a general union (Scheuer, 1986). Therefore, when the NMA limits local employee representatives' role to handling wages and working conditions this might reflect that physicians have the power and position to exert direct professional influence over their own work. Governance structures in the health sector may also be of relevance, as many strategic decisions are likely to occur outside the workplace, rendering the role of local union representatives in strategic decisions less significant. Further, the legitimacy of the NMA has historically rested on its ability to separate union issues from professional issues (Haave, 2014) such that the channeling of professional issues to national and organizational bodies in the NMA may be seen in relation to this history. On the other hand, the NUMGE represents employees rather than professionals; accordingly, it does not seek to represent a specific professional voice. Further, when the NUMGE emphasizes representatives participation and wages and working conditions, this can be attributed to their members' relatively weaker position as employees.

The findings show that the unions relate to employee-driven development in different ways, however the *possibilities* for utilizing knowledge-based, representative influence may also be different. Unions for professionals and their members have a common collective knowledge base and often shared professional ethics guiding their work (Knudsen et al., 2011), and potentially driving development. However, professional autonomy are central to many knowledge-based occupations, and professionals might prefer direct participation to exert professional influence. There is for instance a resilient tradition of protecting the individual autonomy of physicians (Haave, 2014), and such professional understandings might influence views on the viability of representative systems. Members of the NUMGE do not share the same professional knowledge base, yet, may be more prepared to let union representatives engage in employee-driven development on their behalf.

The UEN is the only union in this study that both clearly emphasizes the dual role of local representatives and strongly encourages employee representatives to put forth professional judgments as representatives of the profession. This might be explained in light of the massive political pressure and public criticism of the teaching profession in recent decades. In response, the UEN has surrendered its previous role of watchdog for government initiatives and regulations (Karseth and Nerland, 2007: 341) and developed instead a more proactive role in professional issues and quality development, alongside efforts to assume greater responsibility for the professions' knowledge base (Mausethagen and Granlund, 2012; Nerland and Karseth, 2015: 14). Nevertheless, the findings in this article indicate that this professional approach has been developed more clearly as a national than a local union strategy, as it has not been conceptualized as a proactive approach in relation to representative institutions in the workplace. The professional, yet reactive, attitude toward development may also imply that the UEN policy reflects a reality in which changes are expected to be initiated top-down rather than bottom-up. Moreover, the union identifies the "professional community" as the key player in workplace development without clarifying the role and mandate of the employee representatives vis-à-vis this community. This lack of clarification, and the fact that the UEN is the only union in this study to clearly convey professional issues as relevant for elected representatives, might be attributable to inspiration from international trends and developments. Unions in the education sector are increasingly pursuing renewal by integrating traditional union work with issues related to professional development and educational quality (e.g., Bangs and McBeath, 2012; Johnson et al., 2009; Stevenson and Gilliland, 2015). This development, however, typically occurs in countries and contexts with less institutionalized representative participation than in Norway, and the UEN's documents might reflect the fact that the relationship between representative participation and employees' knowledge and skills is still underdeveloped.

## Concluding remarks

This article has explored the gap between the intentions in the Basic Agreement(s) and the realities of workplace cooperation in the Norwegian public sector, and compared unions with different degrees of professionalization to investigate how each relates to employee-driven development. A key finding was that the unions' own ideas may contribute to explain why the potential for knowledge-based representative participation has been stunted rather than fully developed in the Norwegian public sector. Equally relevant, the analysis revealed intriguing differences between the unions regarding whether they describe their local representatives as a collective professional voice. These differences transcend the traditional division between professional associations and general unions, however, demonstrate that the concepts of professional autonomy and knowledge are relevant in the study of unions and employment relations.

The article adds to the common, context-oriented explanations for the decline of union influence by suggesting that the unions themselves do not engage in the “battle of ideas” (Hyman, 1997). Rather than using their relative strength to develop ideas on how to extend their members' professional influence through representative participation, the unions in this study limit the role of employee representatives to dealing with wages and working conditions or opposing unwanted developments. Hyman and Gumbrell-McCormick (2010: 328) argued that “unions have to be able to combine a willingness to say no [...] with the imagination to present constructive alternatives.” In different ways for different unions, this potential might be embedded in the employees' vocational and professional knowledge and skills and in institutionalized, representative workplace cooperation.

Employee participation has the potential to improve decision-making, development, and innovation (Caraker et al., 2016), and elected representatives may facilitate development by

assuming the role of joint change agents (Butler and Tregasis, 2018). Further, democracy in workplaces generates involvement and work environment quality and could be considered a value in itself—for employees, organizations, and societies at large (Knudsen et al., 2011). Knowledge about how general unions and unions with different professional understandings relate to workplace development in the public sector is still scarce. More research is needed to understand the actual and potential role of union representatives in relation to other members' knowledge, skills and autonomy, and how this relates to workplace democracy and employee-driven, knowledge-based development.

## Notes

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<sup>i</sup> The agreements are often referred to as *the* Basic Agreement (BA) even though separate agreements exist between different partners in different sectors. The BA for the municipalities (with the Norwegian Association of Local and Regional Authorities (KS)) and the BA in the hospitals, or so-called health firms, in Norway (with The Employers' Association Spekter) cover the majority of the members in the unions selected for this study.

<sup>ii</sup> Knudsen (1995) included social integration as a third rationale for employee participation. This article views social integration, and the absence of social conflict, as inherent in both democracy and productivity.

<sup>iii</sup> All the documents were written in Norwegian—the quotations were translated to English by the author.

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