

METALÚRGICOS SEM FRONTEIRAS: BUILDING A GLOBAL UNION AT  
GERDAU

A Thesis

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## ABSTRACT

This thesis is a case study of a cross-border network of labor unions at the Brazilian steel company, Gerdau. In the thesis I trace the ten-year development of this union network from its informal origins to a to a more comprehensive model of global unionism. Finally, I identify four key functions of cross-border networks: coalitions, campaigns, capacity building, and contracts. I hypothesize that each of these functions addresses a specific challenge to building and expanding bargaining power at multinational corporations (MNCs). The thesis concludes that unions will need to make long-term commitments to deepening cross-border activity in each of these four areas in order to build bargaining power.

The Gerdau network began with a series of informal exchanges between North American and Brazilian trade unionists between 1998 and 2003. These exchanges began a process of information sharing and trust building between unions setting the foundation for more comprehensive cross-border activity as the network expanded. In 2005, Gerdau Ameristeel locked out 270 United Steelworkers (USW) members in Beaumont, Texas. Between 2005-2007, the USW worked with allies in North America, South America, and Europe to build a broad comprehensive global campaign to end the lockout and ensure that all its North American union locations were under contracts. In 2006 eleven unions representing workers at Gerdau globally formed the Gerdau Workers' World Council (GWWC). The GWWC was designed to be a more formal body for information sharing, coordinated activity and decision-making amongst Gerdau unions. These unions have made a long-term commitment to further cross-border collaboration with the goal of signing an International Framework Agreement (IFA) with Gerdau management.

## BIOGRAPHICAL SKETCH

Chad Gray was born in 1980 in St. Louis, MO. He graduated from The George Washington University in 2002 with a B.A. in English. After graduation Chad attended the AFL-CIO's Organizing Institute and began work as a field organizer with the Union of Needletrades, Industrial and Textile Employees (UNITE), later UNITEHERE. At UNITE he worked on organizing and bargaining campaigns across the U.S. and Canada in the apparel, distribution, and laundry industries. In April 2005 he left UNITEHERE to learn popular education methods and teach English at the Centro de Intercambio y Solidaridad (CIS) in San Salvador, El Salvador. Chad began his graduate studies towards a Ph.D at Cornell ILR in the Fall of 2006.

To my parents, who sacrificed so that I may learn.

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USW Local 8918 grounded my global research in the perspectives of local Gerdau workers.

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## LIST OF ABBREVIATIONS

ACTWU	Amalgamated Clothing and Textile Workers Union
AFL-CIO	American Federation of Labor- Congress of Industrial Organizations
CAW	Canadian Auto Workers
CCC	Clean Clothes Campaign
CLC	Canadian Labour Congress
CLT	Consolidação das Leis Trabalhistas
CNM	Confederação Nacional dos Metalúrgicos
COLSIBA	Coordinadora Latinoamericana de Sindicatos Bananeros
CSR	Corporate Social Responsibility
CUT	Central Unica dos Trabalhadores
CWA	Communication Workers of America
DIEESE	Departamento Intersindical de Estatística e Estudos Sócio-Econômicos
EPZ	Export Processing Zone
EWC	European Works Council
FAT	Frente Autentico del Trabajo
FS	Força Sindical
FTAA	Free Trade Area of the Americas
FUTINAL	Latin American United Tire and Rubber Industry Workers
GCIU	Graphic Communications International Union
GWWC	Gerdau Workers World Council
IBT	International Brotherhood of Teamsters
ICEM	International Chemical, Energy, Mine, and General Workers' Union
IFA	International Framework Agreement
IFBWW	International Federation of Building and Wood Workers
ILO	International Labor Organization
IMF	International Metalworkers' Federation
ITF	International Transport Workers' Federation
IUD	Industrial Unions Department
IUF	International Union of Food, Agricultural, Hotel, Restaurant, Catering, Tobacco and Allied Workers' Association
MNC	Multinational Corporation
NAFTA	North American Free Trade Agreement
NGO	Non-Governmental Organization
NLC	National Labor Committee
NLRB	National Labor Relations Board
OCAW	Oil, Chemical and Atomic Workers International Union
PACE	Paper, Allied-Industrial Chemical and Energy Workers International Union
PT	Partido dos Trabalhadores

RICO	Racketeer Influenced and Corrupt Organizations Act
SEIU	Service Employees' International Union
SHF	Steelworker Humanity Fund
SINALTRAINAL	Colombian Food and Beverage Workers Union
TAN	Transnational Activist Network
TDU	Teamsters For a Democratic Union
TIE	Transnationals International Exchange
UAW	United Automobile, Aerospace, and Agricultural Implement Workers of America
UE	United Electrical, Radio and Machine Workers of America
UMW	United Mineworkers Union
UNITE	Union of Needletrades, Industrial and Textile Employees
USW	United Steelworkers of America
WCC	World Company Council
WWC	World Works Council

## **Introduction**

On November 16, 2006 seventy trade unionists from nine countries met in a hotel conference room in Porto Alegre, Brazil. These trade unionists, from Brazil, Canada, Chile, the United States, Argentina, Uruguay, Peru, Colombia, and Spain, had come to Porto Alegre to discuss, plan and vote on the formation and agenda of the Gerdau Workers' World Council (GWWC), a cross-border union network representing workers globally at the Brazilian steel company, Gerdau. The Porto Alegre meeting included not just trade unionists but representatives from the International Metalworkers Federation (IMF), the Canadian Steelworker Humanity Fund, and the Brazilian union research institute DIEESE. Workers gave reports on their respective relationships with Gerdau management in their home countries; researchers gave presentations on the differences in legal and organizational structures between countries and on the state of the global steel industry; participants debated strategies for building towards an International Framework Agreement (IFA) with Gerdau management.

For Gerdau workers the November 2006 meeting was a critical moment in itself: the establishment of a formal global union network in order to maintain communication between Gerdau workers globally, share information, formulate strategy, and build towards an IFA. This level of international coordination and cooperation between multiple unions is rare enough in itself, but the Porto Alegre meeting was notable not just for what went on inside the conference room, but for how it came about and the context in which it was occurring.

This meeting, while the official founding of the GWWC, was actually the third international meeting of Gerdau workers. Workers from Brazil, Canada and Chile, with coordination from the Canadian Steelworker Humanity Fund, met for the first

time in 1998. In 2003 Gerdau workers from around the world met again, this time with representatives from Argentina, Uruguay, the United States and the IMF present. These international meetings had evolved out of a national network of Gerdau workers in Brazil begun in the 1980s.

The 2006 GWWC meeting was attended by a delegation of workers from Canadian, US, Argentine, Brazilian, Uruguayan and Colombian Gerdau locals. Led by Judith Marshall of the Canadian Steelworker Humanity Fund, these workers had spent two weeks touring Gerdau facilities in Colombia and Brazil, meeting face to face with other rank and file Gerdau workers and comparing notes on their respective legal and union frameworks. This study group was unique because it integrated a face-to-face, pedagogical, worker education component to the cross-border strategies at Gerdau. Workers were encouraged to understand and question how their local and national unions were structured (existence of a grievance procedure, multiple unions in a workplace, presence of shop stewards etc), how this structure was similar to or different from that of other unions, and how workers could build from these similarities and differences. Rank and file workers were forming personal relationships across-borders with other Gerdau workers. To coordinate cross-border activity, unions in the North would need to understand the legal and structural contexts in which unions in the Global South operated. Perhaps most importantly, workers needed to see the communities their fellow workers lived in, eat with them in their union halls and meet their families to make personal bonds which would outlast a week-long trip.

November 2006 also commemorated the eighteen-month anniversary of the lockout of 270 US steelworkers at a Gerdau facility in Beaumont, Texas. The members of United Steelworkers (USW) Local 8586 had been locked out by Gerdau Ameristeel (Gerdau's North American subsidiary) in May 2005 shortly after being

acquired, along with three other USW locals, from North Star/Cargill. Soon after the lockout, the USW launched a global campaign to end the lockout and had already achieved a partial victory when Gerdau ended the lockout in December 2005. But the campaign continued as more North American USW Gerdau contracts expired without collective bargaining agreements.

By the November 2006 GWWC meetings, the USW campaign had gone beyond the traditional confines of the bargaining table to incorporate global allies across North America, Latin America and Western Europe, environmental and regulatory agencies, shareholders, and political allies in both the US and Brazil. There was not one single “magic bullet” strategy to bring Gerdau back to the table. The USW carefully mapped Gerdau’s operations, profit centers, key actors and followed the flows of power to build an effective comprehensive campaign. Understanding how, where and through whom power circulated was a key component in formulating a campaign strategy. Leverage from traditional bargaining table tactics would not be enough to take on a powerful multinational firm. The USW expanded its network of leverage from the bargaining table to the surrounding community, national unions, regulatory agencies and ultimately, integrated the broad network of union allies in North America, Latin America and Western Europe to build a campaign to bring Gerdau Ameristeel management back to the table. The Gerdau union network provided critical infrastructure for the USW’s cross-border campaign.

The seventy trade unionists in the Porto Alegre hotel room were there to officially establish the GWWC, but this step was more than just a formality. Establishing the GWWC was just one way of articulating the legacy of other activities that had preceded it. The workers at the Porto Alegre meeting, and many others who couldn’t make it, had been activists and internationalists for years before. While the 2006 GWWC meeting was an achievement in itself, it was not an extraordinary stretch

of the imagination for these workers. Rather, the meeting was the logical next step given the diverse cross-border activities Gerda workers had been engaged in for the past eight years: study groups, solidarity campaigns, information exchange, strategic research, and face to face interactions through barbeques and social gatherings.

### *Thesis Context and Theoretical Issues*

This thesis is a case study of how the Gerda union network evolved from its informal origins to a more formal and comprehensive form of cross-border organization. Why has the Gerda network lasted for more than ten years while others have foundered or developed unevenly? What processes and activities have given the Gerda network sufficient vitality and flexibility to balance the needs of multiple members with different interests? What explains both continuity of organization and depth of activity at Gerda? What lessons does the Gerda case offer for other unions' attempts to develop cross-border strategies?

To answer these questions I posit four key processes of cross-border union activity: coalitions, campaigns, capacity building, and contracts. Over the last thirty years unions in various countries have used these strategies to build bargaining power and promote solidarity between workers; none of them are new or "innovative" strategies in themselves. But, more often than not, these strategies have been used individually, opportunistically, and unevenly, rather than as part of a more comprehensive approach to building cross-border unionism.

Surprisingly, a theoretical framework for analyzing these processes in their interaction with each other has never been formulated. Instead of seeing one campaign, or the signing of an IFA as the sole litmus test for successful cross-border union strategy, researchers need a more comprehensive framework through which to analyze cross-border unionism. A solidarity campaign, the signing of an IFA, or the

establishment of the GWWC in the Gerdau case, is often the result of immense efforts over many years by unions, usually in the face of corporate opposition, and should not be underestimated as an important indicator of success, but in themselves these achievements are rarely able to encompass the full range of activities needed to build both continuity over time and depth of activity.

I argue that what is needed is not just a grab bag or laundry list of tactics and strategies for unions to use, but a strategic framework for building long-term cross-border unionism. Many unions have tried various individual international strategies, but these strategies have usually been piecemeal and defensive with little follow-up (Nissen 1999). Activities such as cross-border campaigns or worker-to-worker exchanges have not been integrated into other cross-border processes such as research or shared decision-making. When these processes are disconnected from other important union functions they will remain isolated and produce isolated gains. Isolated gains in collective bargaining, organizing and political support are more easily rolled back by the efforts of multinationals (through coercion or co-opting of these gains) leading unions to constantly engage in rearguard, defensive actions (Hickey 2004). Many authors have touted the need for international activity by unions to combat the growth of multinationals (Banks and Russo 1999; Gordon and Turner 2000; Stevis and Boswell 2008), but what is needed is not just an increase in the frequency of activity, but a qualitative deepening of cross-border activities in a way that reinforces other core activities.

This thesis was inspired by the hypothesis that cross-border campaigns by themselves are not enough to build lasting bargaining power at multinational firms. Campaigns are an important piece of labor's international strategies, but in order for the gains made during these campaigns to be long lasting, campaigns must be combined with other international strategies to ensure both organizational continuity



and durable collective bargaining gains. As Bronfenbrenner (2007) explains, “Finally, unions can no longer afford to limit their cross-border activity to defensive actions. Strategies such as strategic corporate research, worker-to-worker exchanges, global coalition building, and comprehensive campaigns need to become a constant in the organizing and bargaining relationship with these large transnational firms” (2007:14).

While there has been increasing an amount of research on comprehensive campaigns as a tool for union revitalization (Banks and Russo, 1999, Greven and Russo 2003), it is important for unions to recognize that campaigns alone will not produce lasting gains at most corporations. Hickey (2004) notes in his analysis of the 1996-2001 Paper, Allied-Industrial, Chemical and Energy Union (PACE) campaign at Crown Petroleum

The third lesson of the Crown dispute is that sustained revitalization of the US labor movement requires more than the effective application of comprehensive campaign tactics. While PACE succeeded in rebuilding bargaining power by reaching out to other stakeholders and expanding network of leverage against Crown, the strategy is reserved for disputes where the existence of the union is at stake. (2004: 139)

Likewise, unions will need not just internal organizational change within their own unions, as Hickey argues, but new structures for representing workers across-borders, especially at multinational corporations (MNCs). Cross-border comprehensive campaigns are a critical component of transnational union strategy, but when used only in defensive crisis situations, in isolation from other activities such as organizing, collective bargaining and coalition building, or without proper financial or institutional support, the gains made by these campaigns are likely to be short-lived. More importantly, without direct worker participation in cross-border activity, the process of sowing internationalism at the rank and file level, will be thinly rooted and unlikely to fulfill the project of renewal at the grass roots (Marshall and Garcia-Orgales 2006).

While I argue this case is a story of success where others have failed, it is always a precarious success story. Since there is no scientific model for building cross-border unions, the Gerdau network must evolve and adapt to new and unique situations. The Gerdau case is not the story of an ideal form of cross-border organization. Like any organization, the Gerdau case has its faults and weaknesses, discussed below, but thus far it has rooted itself in a solid foundation of trust and mutual respect, rank and file participation, an aggressive approach to defending workers rights, and a shared commitment to future organization. Through both its strengths and its weaknesses, the Gerdau network has articulated a range of key components for cross-border union activity. It is this *articulation* of key processes, rather than their absolute success or failure that makes the Gerdau case an important model for a case study.

In order to understand this process of building cross-border unionism I trace the history of the Gerdau network from its early stages of informal exchange to the more formalized structure of the GWWC. I begin by setting out a theoretical framework through which to examine the cross-border unions. The next chapter is a review of existing literature on cross-border unionism. This is followed by a history of cross-border strategies at the USW and CUT in order to provide context for the understanding the formation and development of the Gerdau network and relevant cross-border strategies.

The case study begins in 1998 with the First Inter-American Meeting of Gerdau Workers and documents the early exchanges between unions at Gerdau. The chapter on the USW's 2005-2007 North American comprehensive campaign highlights the role of cross-border strategies in the campaign as well as the Gerdau network's role in these strategies. A short chapter on the foundation of the GWWC in 2006 concludes the case study section. Finally, in the conclusion I will discuss four

characteristics of the Gerdau network through the original theoretical framework and discuss other relevant, contextual influences such as the role of national networks, Global Union Federations (GUFs), and bridgebuilders. I conclude by addressing some challenges to the theoretical model and Gerdau case and offering some prospects for future research.

### *Theoretical Framework*

In recent years cross-border networks, especially cross-border union networks, have become an important subject for activists and scholars (Keck and Sikkink 1998; Evans 2000; Anner 2004; Seidman 2007). Keck and Sikkink define networks as “forms of organization characterized by voluntary, reciprocal, and horizontal patterns of communication and exchange...it stresses fluid and open relations among committed and knowledgeable actors working in specialized issue areas” (Keck and Sikkink 1998: 8). In the trade union context I define networks as linkages created between unions represented by a common multinational employer, unions linked to a multinational through commodity chains, and employees linked through outsourcing or indirect ownership. These networks are “counter-hegemonic” (Evans 2000), and expand the scope of core union activity, bargaining, organizing, and political activity, to a broader set of organizations in order to reflect the cross-border and often cross-industry organization of multinational firms.

This thesis argues that in order for unions to build strategic, long-term bargaining power at multinational firms, unions will need to engage in four key processes: coalitions, campaigns, capacity building, and contracts. These activities should be done in a way that reinforces and strengthens other key activities: campaigns to achieve or enforce basic rights for all workers, grassroots, rank and file coalitions to build stronger representation at the international level etc. Engaging in

these activities on their own, without reinforcing mechanisms, may lead to victories but these will tend to be fleeting and difficult to sustain over the long term (Hickey 2004).

International solidarity needs to be developed and worked on, not taken for granted. Unions need to develop systematic programs for developing cross-border networks rather than relying on ad hoc or defensive coalitions created after a crisis has broken out. Each network will be organizationally unique depending on industrial and commodity chain context, degrees of union internationalism, mix of union/NGO participation and level of activity but each of these networks provide important resources for unions on the local or national level. To explain my framework I present cross-border union networks as a set of four processes which constitute network activity. Each of these processes responds to a specific challenge labor unions are faced with when building and expanding multinational bargaining power.

### ***Challenge #1: Competition from other workers.***

#### ***Coalitions***

First, networks build union-to-union coalitions and member-to-member relationships. To define coalition work I borrow Tarrow's (2005) term "socialization through collective action." Describing transnational protest events Tarrow writes, "But participation in such events can be transformative for those who participate in them. The experience of marching side by side with others from different countries and areas of interest can help create broader identities and issue definitions" (2005:178). Worker exchanges, study groups, and cross-border meetings build a foundation for other, more developed forms of cross-border union work by first creating a psychic and physical transformation in how workers view their counterparts in other countries. Seeing other workers as allies, not as competition, is the first, and most fundamental, step in

building long-term cross-border networks. Coalition building is the organizational principle upon which other network activities are based.

It is helpful here to note Johns' (1998) distinction between "accommodationist" and "transformatory" solidarity to emphasize that simply engaging in global exchanges is not transformatory in itself. For Johns "accommodationist" solidarity "seeks not to transform social relations, but to accommodate them while reasserting the dominance of a particular group of workers within capitalism's spatial structures" (1998:256). By contrast,

In a transformatory solidarity organization, universal class interests dominate over interests that are spatially derived and rooted. Campaigns are designed to unite workers across space in order to fundamentally transform social relations of production into something more humane, by preventing capital's wanton production of space, its creation and perpetuation of uneven development. In this case, solidarity programs seek to equalize both social conditions and investment for job creation. Such efforts do not prioritize one set of workers over another. (Johns 1998: 256)

Coalition work must qualitatively encourage solidarity by overcoming national, gendered, racial and geographical boundaries.

Two components of Johns' work are important in order to assess the effectiveness of coalition building. First, "specialized agenda" as "an understanding of the critical importance of the spatial division between workers, particularly at the international scale, in preventing the empowerment of the international working class." (Johns 1998: 257). How do workers, and by extension the organizations and union officials who represent them, understand spatial versus class differences *vis a vis* capital? Are workers and their union's interests aligned with the interests of national capital, or do workers see themselves as members of an international working class without allegiance to a national ideology? The second category for assessing the effectiveness of coalition building is the relationship between "self-interest and shared

interests.” Johns writes, “Solidarity level is also shaped by a group’s definition of its own self-interest in relation to what it perceives as the interests of workers in other countries” (Johns 1998: 257). While Johns notes that no organization can function out of complete altruism, the degree to which workers define their own self-interest as equal to those in other countries is a measure of international solidarity. Are workers’ interests the same irrespective of national origin, or do they see themselves as competing with other workers for the same jobs?

Exchanges, study groups and social events reinforcing “transformatory” solidarity are important to union networks because they involve rank and file workers directly interacting with other rank and file workers from other countries. This has multiple effects. First, as one union official described, it “makes members internationalists.” Worker exchanges may provide opportunities to expand geographical frames of reference (and possibility for action) and create a positive view of other workers, not simply as competition or “Other.”

Second, exchanges plant the seed of internationalism as a possible instrument for local union activity. Seemingly local or plant level issues may be better resolved through international strategies. It is uncommon for workers on the local level to put forward global solutions to local problems unless these workers have some direct connection to cross-border structures or representation. Exchanges and participation in cross-border structures such as union networks open the door to employ global tactics in local contexts.

All of these are possible, and more effective, when workers are able to meet their brothers and sisters, discuss issues in common, and share social events. “This transnational education effort is intended to give participants an experience of ‘globalization on the ground.’ The idea is that the visceral experience of meeting counterparts, in their homes and communities, combined with a framework on

globalization can contribute to building support within the union for its international agenda...” (Shaiken et al. 2002:351). These shared personal bonds between workers become bonds of solidarity and provide the fiber of more extensive global organization.

*HYPOTHESIS #1: Labor transnationalism which views foreign workers as competition for similar jobs and/or views foreign workers’ interests as different or unequal to domestic workers will produce pressures to divide workers in the same firm. This produces uneven development of bargaining power and reduces the likelihood of worker activity based on solidarity. In order to challenge this trend workers and their unions will need to engage in transnational activities encouraging “shared interests.”*

### ***Challenge #2: Building and Expanding Bargaining Power***

#### ***Campaigns***

Campaign work may be done to support organizing, collective bargaining or union recognition. Bronfenbrenner and Juravich discuss the central role of campaigns: “Collective bargaining and contract campaigns matter because they are the focal point for the power and voice that workers can achieve only through unionization. Collective-bargaining campaigns are also the forum in which unions and union members most connect with customers, clients, and the broader public. When successful, these campaigns result in a significant expansion of union organizing opportunities, bargaining leverage, political clout, and a concomitant shift of public support towards unions. When they fail...they undermine labor’s efforts for years to come” (Bronfenbrenner and Juravich 2001: 212).

Bronfenbrenner and Hickey (2003) outline ten elements of a “comprehensive organizing model”: adequate staff and financial resources, strategic targeting and

research, active and representative rank and file committees, participation of volunteer organizers, person to person contact inside and outside the workplace, benchmarks to assess goals, issues which resonate in the community at large, escalating pressure tactics involving members internally in the workplace and externally in the community, and building for a first contract before the election. Their survey of organizing campaigns found that “across all industrial sectors, percent win rates are much higher in elections where unions use a comprehensive organizing strategy incorporating more than five comprehensive tactics, compared to campaigns where they used five or fewer tactics.” (Bronfenbrenner and Hickey 2003: 24).

Campaigns have developed from early forms of “corporate campaigns” (Jarley and Maranto 1990) to more sophisticated and “comprehensive” campaigns using strategic research to find vulnerabilities in company’s corporate structure and growth plan (Juravich 2007). Successful campaigns expand local and national union bases, build member density, produce new opportunities for union activity and send the message of solidarity to management. Networks may be used as an infrastructure of communication and solidarity support during campaigns (Banks and Russo 1999; Juravich and Bronfenbrenner 2003). Some global campaigns such as the Bridgestone/Firestone and Continental Tire campaigns have been responses to situations “where the existence of the union is at stake,” (Juravich and Bronfenbrenner 2003; Greven and Russo 2003; Hickey 2004) while others have been designed as more proactive and strategic campaign components (Witt and Wilson 1999; Frundt 2002; Garver et al 2007). Campaigns such as the Justice @ Quebecor campaign used volunteer organizers from foreign countries on house calls (Tate 2006). In both offensive and defensive campaigns, cross-border solidarity networks have proved to be crucial components to the campaign outcomes.



*HYPOTHESIS #2: Unions who use comprehensive organizing and bargaining strategies to organize the unorganized and bargain collective agreements will produce longer lasting and deeper gains in bargaining power.*

***Challenge #3: Continuity of organization and internal voice***

***Capacity Building***

Capacity building is the means by which networks become both institutionalized and democratized in order to build long-term continuity and organizational structure. While networks are celebrated for their flexibility and horizontal organization, Tarrow notes “In contrast to the excitement and spontaneity of decentralized international events, *institutionalization* can seem like a tired bureaucratic solution...some degree of institutionalization is needed to transform these encounters into enduring coalitions” (2005: 177). Cross-border campaigns, solidarity activity, and other “event coalitions” (Tarrow 2005) tend to produce short-term, but high-involvement alliances focused on one common goal. These coalitions are less likely to endure once the original issue has been resolved. In order for long-term organization to be sustained, some form of institutionalization and structure needs to be set up.

Shared decision-making, regular meetings, and commitment to a common set of goals build the long-term capacity of unions to maintain cross-border organization. “For coalitions to survive there must be mechanisms for resolving tensions. Rules and institutional arrangements are necessary to reinforce trust relations in new and high-risk situations and substitute for them when they do not exist...There must also be procedures put in place that permit all representatives to express their voices in ways that could influence the outcome.” (Levi and Murphy 2006: 658). Capacity work builds the power of the network as a formal institution at the local, national and global

levels. The credible threat of a cross-border network is enhanced when that network can speak with a unified and long-term voice.

In the context of campaigns, capacity building is important because it means that unions do not need to “reinvent the wheel” by assembling a new coalition of actors and allies in preparation for, or after, a conflict has erupted and solidarity is needed. In order to do this, unions must have a space to communicate with each other, resolve differences, and make strategic decisions about future activity.

Unions will also need to commit resources to developing these relationships over a long period of time. At times, this may mean making difficult decisions when balancing local needs with ideals of global solidarity (Johns 1998; Tattersall 2007). Networks, in their various levels of formalization and forms of organization, provide the opportunity for continuity of organization, but members will need to make some long-term commitment to shared goals and provide some space for shared decision-making.

*HYPOTHESIS #3: For long-term, transnational organization to be sustained, some form of institutionalization and structure will need to be agreed upon and established by participating unions. This structure will need to provide space for resolving differing interests.*

#### ***Challenge #4: Enforcement of transnational labor rights and bipartite structure***

##### ***Contracts***

The fourth function of cross-border networks is achieving “contracts,” especially “contracts” at the global level. The term “contract” is a slight misnomer, especially in reference to IFAs, because most IFAs tend to be non-binding agreements. Effectiveness of IFAs is usually limited by the power of signatory unions to enforce the IFA. But it is important to include IFAs and “contracts” in this framework for

multiple reasons. First, on the union side, IFAs presuppose a high level of self-organization. On the company side, IFAs force firms to acknowledge some level of recognition, on a global level, for basic rights for all employees including those of subcontractors and suppliers. These basic rights include ILO Core Labor Standards such as prohibitions on the use of child labor, forced labor, policies against racial and gendered discrimination as well as the right to freedom of association and collective bargaining (Stavis and Boswell 2008).

The recognition of basic rights is especially important where national labor laws may be weak or unenforced allowing multinationals to ignore or skirt collective bargaining agreements (Frundt 2007). An IFA is not a panacea, but may be an important tool in cross-border campaigns to “bargain for space,” engage in dialogue, and secure some access to the home MNC (Wills 2002).

IFAs and international contracts may exist mainly as an ideal for most cross-border networks, yet they still provide a crucial role in the collective imagination of cross-border networks by providing a long-term organizing goal and building a common frame for activity. They are concrete goals and achievement and represent a level of global organization most workers do not have. An IFA is not an impossible goal, but it is one that will require long term and sustained commitment to organization and activity on multiple geographical scales.

*HYPOTHESIS #4: Because multinational firms are subject to uneven levels of national regulation and these uneven regulations privilege some workers' interests over others, and because of the lack of effective transnational regulatory frameworks, unions will need to build some form of regulatory and enforcement structure with the firm. This regulatory structure will tend to be weak because of the underdeveloped state of transnational regulation and the limits of national regulatory frameworks.*

## *Methods*

For this thesis I combine a comprehensive literature review of global union strategies with a qualitative case study of the Gerdau global network. The literature review explores the theories, tactics, and strategies used by unions to develop cross-border organization. This literature review also helps frame the theoretical contribution of this thesis.

For the case study I rely upon extensive document and media research and open ended, unstructured interviews. Media research included newspapers, industry journals, union publications and internet links. I was given access to campaign files, flyers, inter and intra-union correspondence and meeting notes from US, Brazilian, and Canadian union officials. The interviews were conducted with rank and file union members (USW locals involved in the campaign), local and national union representatives (USW in the US, CUT and Força Sindical in Brazil) and international trade union officials (AFL-CIO Solidarity Center, International Metalworkers Federation). These interviews have been conducted face to face, via telephone and internet connection (Skype), usually lasting about an hour each with follow up email exchanges when necessary.

I attended a Gerdau Workers' World Council meeting in Montevideo, Uruguay in May 2007, the Congresso Nacional dos Metalúrgicos of the CNM/CUT in São Paulo, Brazil in June 2007 and observed a worker exchange of US Gerdau employees between the USW and CNM/CUT and Força Sindical in São Paulo, Brazil in June 2007.

# **I. Labor Internationalisms**

## *Introduction*

Much has been written in recent years on the possibilities, successes and failures of international unionism. International unionism is not a new phenomenon in itself. Marx's exhortation for workers of the world to unite dates back to 1848 (Marx 1972) and attempts to coordinate bargaining and organizing efforts date at least back to the 1860s (Lorwin 1929). What is new are global economic changes which have impelled unions, now more than ever, to organize internationally. The rise of multinational corporations has shifted the playing field of industrial relations and ushered in an era of largely unchecked corporate hegemony. Deregulation and privatization of previously protected national industries (often heavily unionized as well) have opened new spaces for investment capital (Klein 2007). New forms of technology have linked geographically disparate areas into networks of production, circulation and consumption, challenging traditional models of economic organization (Gereffi 1994).

Largely unprepared and ill-equipped for this global reorganization of capital, labor unions have had to create new and innovative organizational strategies and models to keep pace with the shifts in global capitalism. Some unions have opted for a more conciliatory, social partnership approach, cutting deals to save jobs and maintain traditional influence in the short run (Anner 2004). Other unions have struck a more confrontational approach, challenging capital on a global scale and attempting to create international linkages to strengthen local bargaining power (Bronfenbrenner 2007). In both cases, and in the various permutations in between these two poles, the internationalization of capital has precipitated a change in labor union structures and repertoires of action. The reorganization of global capital has meant new opportunities

for strengthening labor, not just an unending series of defeats and concessions (Moody 1997).

### *Historical Labor Internationalisms*

The earliest trade union internationalisms began around 1859 when British employers in the construction industries, faced with demands for increased wages and reduced working hours, threatened to import cheaper, unskilled workers from the Continent to undercut potential strikes. British unions along with French, Belgian and German allies engaged in isolated sympathy strikes and calls for stronger international cooperation (Lorwin, 1929). Trade unions and radical political organizations (especially those coming out of the revolutions of 1848) began to forge international alliances culminating in the formation of the International Working Men's Association, The First International, in October 1864. Member unions were rooted in national labor struggles and were bound together mostly on voluntarist principles, but advocated a more unified international political agenda. This initial attempt to build an international organization for labor unions was fraught with sectarian battles between communists, anarchists, syndicalists and social democrats which would plague attempts at international cooperation for the next century (van Holthoon and van der Linden 1988).

Attempts at creating and sustaining international organization were scattershot and largely ineffective throughout the late nineteenth and early twentieth centuries. This trend could be attributed primarily to the growth of national labor parties and “nationalization” of trade union demands (Stavis and Boswell 2008). Early legislative successes such as the establishment of minimum wage standards and child labor statutes, early union demands going back to the mid nineteenth century, led European trade unions to focus on domestic politics through labor-based parties. These mass-

based political parties rose to prominence in the advanced industrial nations of Western Europe and were successful in channeling the demands of labor unions into broader social legislation. But the redirection of trade union goals within the machinery of the nation state also meant a realignment of workers' goals with the goals of their state and national capital and reduced the incentives for labor unions to look for international solutions to "national" problems (Stavis and Boswell 2008: 53).

This reorientation of workers' interests as "national" interests also produced divisions within labor union policies toward cross-border strategies. Trade unions were hardly immune from imperialist sympathies, often colluding with national industrialists in supporting legislation to restrict trade or migration from the colonies under the auspices of protection of "standards of living" or "cultural heritage." Racism, nationalism, and imperialism colluded to inhibit cooperation between European unions and workers in the colonies but exceptions did exist, especially for those unions aligned with Communist Internationals and the successive World Federation of Trade Unions (WFTU) in the early twentieth century (Stavis and Boswell 2008; Sukthankar and Kolben 2007).

Sukthankar and Kolben (2007) highlight the ways in which British colonial labor legislation and trade policies were designed to divide the interests of British and Indian workers in order to inhibit cross-border solidarity activities. The British Factory Acts of the 1880s were designed as protective labor legislation to regulate the hours and working conditions of women and children in British textile and heavy industries while at the same time excluding coverage of workers in sites which produced the raw materials for these British industries (2007). By the 1927 the British Trade Disputes Act was passed to demarcate "acceptable" (those "designed to advocate workers' own interests") and "unacceptable" (those "taken for the interest of other workers or other movements through general strikes and sympathy strikes") actions workers were

legally allowed to undertake (2007: 65). Legislation was designed to keep workers' interests geographically isolated from others,' squarely within the boundaries of national borders and away from any form of organized cross-border collaboration through general strikes or sympathy strikes.

The culmination of this nationalization of trade unions' demands was the rise of national industrial relations systems (Dunlop 1958). These tripartite systems were designed to integrate labor and capital into national arrangements for resolving conflicts. This relationship would be regulated by the state and enforced by juridical statutes to ensure a productive and stable relationship that would promote both the material capabilities of national industrial growth as well as social welfare provisions and a voice for labor in governance. Kerr et al. (1960) claimed that competition between competing ideologies was declining due to the age of total industrialization leading to a decline in worker protest. For Kerr et al. the only questions left for labor and capital to sort out were technical problems of how to administer new technologies and fairly distribute national goods.

Yet, despite the optimism of national industrial relations theorists about the possibilities of industrial harmony, conflict between organized labor and capital was not diminished by the nationalization of demands. Instead, it was the institutions by which conflicts were resolved and the issues over which conflicts arose which were redefined within the boundaries of the nation state. The internationalization of capital and push for export-based growth had led trade unions, especially in the most globally integrated auto, rubber and chemicals sectors, to explore new ways to build bargaining power globally. Capital had organized itself on an international scale while unions were still organized on at the national level. This disparity of organization gave multinational firms the ability to exploit national differences in labor and to whipsaw on an international level. By the mid-1960s new attempts to build international labor



representation had arisen in the form of World Company Councils (WCCs) and Multinational Collective Bargaining (MNCB). By 1974 more than 30 WCCs had been formed, though only a handful ever developed beyond initial high-level meetings.

Charles Levinson, Secretary of the International Chemical and General Workers Union (ICF) theorized that the objective economic and political conditions for multinational unionism had arrived, though the subjective conditions of the unions themselves were still immature. Unions would be unable to build the structures necessary to match multinational firms at the bargaining table. “The objective conditions for such a program exist. They are in fact more advanced than the subjective ones...The difficulties lie largely with the unions themselves, in their ability to really turn from purely national commitments and concerns to the more international ones” (Levinson 1972:141). Through research and the formation of firm-based company councils, Levinson concluded unions would be able to exchange ideas, build common agendas and eventually exert sufficient international pressure on multinational firms to equalize conditions across all plants in the firm through full multinational collective bargaining. The internationalization of capital would form a natural structural foundation for international solidarity to develop.

These optimistic calls for building international structures were progressive for their time and many of Levinson’s conclusions were ultimately proved right, but in the mid 1970s unions were for the most part unable to build the organizational capacity to engage in truly multinational bargaining. In the case of the auto industry economic conditions were rapidly changing and Southern nations such as Brazil, Japan and Korea, where growth was occurring most rapidly, were not included in the early models of multinational collective bargaining. The WCC’s focus on wage parity was an ambitious (and problematic) first step on which to build international organization, setting the bar too high for meeting these initial demands. Baldry et al.

(1983) remind international organizers that “Labour, in contrast, relies on identity, consciousness, solidarity and determination, which is generated essentially in the work community; thus multinational and even inter-plant solidarity is in certain key respects almost an alien thing...In our view there is no ‘natural’ tendency for such solidarity to evolve...” (Baldry et al. 1983). There would be no short cuts or “natural evolution” to building effective international worker solidarity without building strong rank and file solidarity at the local and plant levels.

Other critics of the era were more pessimistic about workers’ abilities to build lasting international solidarity structures. Olle and Schoeller (1977) believed that Levinson’s (1972) exclusive focus on the firm as the organizing principle for international solidarity would only exacerbate protectionist tendencies and reproduce uneven national development. Ulman (1975) agreed with Levinson (1972) that multinational corporations’ transnational organization gave them vast advantages over a more locally based labor force, but ultimately the inducements to engage with national industrial relations structures would be too attractive for unions to trudge through the difficulties of forming international collective bargaining structures. Thomson and Larson (1978) emphasized that while unions had raised hopes for international solidarity to new heights, much of previous international trade union work was, in reality, implicated in Cold War factionalism which opposed independent workers’ movements in the Global South.

### *From Corporate Campaigns to Comprehensive Campaigns*

With the breakdown of New Deal labor relations system in the 1980s (Kochan, Katz and McKersie 1986), labor unions have increasingly looked to alternative strategies to gain ground in a hostile economic and political environment. Faced with declining membership, global competition, shifts in corporate structure and an

increasingly anti-union bias in state and federal government, unions have had to fashion new strategies to respond to these changes. Early literature on labor union strategies examined the use of “corporate,” and later “comprehensive,” campaigns to counter the power corporations hold by using research to identify weaknesses, devising strategic interventions according to the findings of this research and building new constellations of allies outside of the traditional union-government axis (Perry 1987; Jarley and Maranto 1990; Hickey 2004). Unions have integrated a wide array of methods, strategies and new allies to fight corporate power: community coalition building and new union allies, consumer boycotts and public awareness, pressure on lenders and creditors and using courts and regulatory agencies (IUD 1985; Bronfenbrenner and Hickey 2003).

By the 1970s corporate structure had shifted from vertical and horizontal integration along industrial lines to a “core/ring” structure with production decentralized among contractors, subcontractors, and outsourced labor. Corporations had become “dis-integrated” (Brecher and Costello 1998). Unions had been accustomed to making demands and winning gains at the bargaining table, especially through pattern bargaining in core industries such as auto, steel, rubber and meatpacking. But as corporate power dis-integrated and a recession hit the US in the early 1980s corporations seized the opportunity to go on the offensive against the long established pattern agreements unions had built in the post-New Deal era. Management pushed for concessions, give-backs, work rule changes, wage freezes, and layoffs. The balance of power between unions and companies had shifted through both objective (recession and shifting corporate power structures) and subjective conditions (bureaucratization and paralysis by union leaders who didn’t realize the fundamental rules governing industrial relations had changed) (Fantasia and Voss 2004).

High-profile strike defeats in both the public sector at PATCO in 1981, and private sector at Phelps-Dodge in 1983 illustrated the decreased effectiveness of strikes and traditional repertoires of action to affect bargaining outcomes. Historically the most important weapon labor could wield, strikes had not only become ineffective in the industrial relations climate of the 1980s, but were now being used as strategy by management to break unions outright (Moody 1988). The combination of corporate restructuring, a more aggressive management zeitgeist using concessions as a labor relations strategy, and the willingness to use permanent replacements to break strikes (and break unions) had left unions bewildered and looking for new tactics.

One strategy used by unions to combat this reappropriation of strikes by management was in-plant strategies (Balanoff 1985; Metzgar 1985). Updated from 1930s direct action tactics in industrial organizing campaigns, in-plant strategies used strategic work-to-rule actions inside the workplace to disrupt the work process. This strategy was successful in some workplaces, but required a long-term commitment to organization and discipline that was difficult to sustain over long periods of time and still did not get to the fundamental restructuring corporate power. Local militancy was not enough to beat global capital.

Organizer Ray Rogers is credited with coining the term “corporate campaign” during the Amalgamated Clothing and Textile Workers Union (ACTWU) 1976 organizing drive at J.P. Stevens. This victory promulgated certain tactical innovations, particularly the use of the consumer boycott, pressure on Stevens’s board of directors, and an emphasis on understanding how key internal and external relationships affected corporate structure. “What Rogers brought to the union’s battle with J.P. Stevens was a lunge at the company’s financial throat. He targeted the insurance firms and financial backers the company relied on. He put public pressure on J.P. Stevens board members. He engineered efforts to elect dissident directors for the company” (Franklin

2001: 31). Rogers' focus on key relationships, both internal and external to the firm, meant unions would have to revise and invent new tactics for pressuring management. The site of leverage was no longer centered at the bargaining table, but rather extended out in a network of stakeholders: boards of directors, prominent personalities, investors, retailers, customers and suppliers. Rogers used these relationships as public leverage chips, often shaming individuals related to the company in dispute or publicizing compromising pieces of information about the individual or firm. Yet despite high profile victories such as J.P. Stevens and Campbell's Soup, Rogers' corporate campaign strategy failed to be the panacea it was hailed as by some critics.

The AFL-CIO's Industrial Union Department (IUD) published "Developing New Tactics: Winning With Coordinated Campaigns" (1985) as an early handbook for corporate campaign strategies outlining initial steps in planning and implementing a campaign. Tactics included legislative initiatives, regulatory and oversight complaints, consumer actions and boycotts, pressuring lenders, pension funds and stockholders and in-plant strategies to build an extensive and escalating campaign against the firm.

Perry's (1987) analysis of ten early corporate campaigns found that the most successful campaigns took place at firms with "a high degree of sensitivity to adverse publicity" (1987: 123). These successful campaigns were able to translate a local labor struggle into a public campaign that elicited sympathy from the general public. Issues of patient care (Beverly Nursing Homes) and child labor (Campbell Soup) brought public sympathy with workers and painted the firm as a "corporate outlaw" that was dangerous to society as a whole, not just to the workers in dispute.

Subsequent campaigns in the 1980s showed that no two campaigns were alike and there were no cookie cutter tactics that could simply be applied during the next campaign. Defeats at Phelps-Dodge (1983), Hormel P-9 (1986) and International Paper (1988) integrated various corporate campaign tactics, but campaigns tended to

be defensive and undertaken while unions were already on strike and under immense pressure. While these campaigns were built on militant memberships, utilized hard-nosed tactics at the bargaining table, and involved active local communities, traditional tactics could not overcome vast imbalances in power faced by these local unions. This echoed Jarley and Maranto's findings that strike support campaigns were the least successful due to last minute planning, a lack of a unified response by unions (i.e. uneven allocation of resources between local and national union bodies) and the continued lack of preparedness by unions against the new corporate offensive.

Labor's experience in the mid-1980s showed that no individual technique, not corporate campaigns nor inside tactics, was the panacea for an embattled union movement. Unions found that even with the full community support and a united workforce, many employers were impervious to community-based campaigns. Too often in the global economy, decisions affecting workers lives were being made by financiers and dealmakers thousands of miles away. The consensus began to develop by the late 1980s that none of these strategies alone was sufficient to win. Clearly, successful campaigns...depended on running a multi-faceted campaign that put escalating pressure on the employer in the workplace, in the community, in the corporate boardroom and around the world. Hence the term "corporate campaign" was replaced by "coordinated campaign" or "strategic campaign." (Juravich and Bronfenbrenner 1999: 71-72)

Campaigns needed to be more comprehensive than the scattershot attempts to tarnish the public image of the company and needed the support and resources of the international union, not just the local under attack.

What was needed to increase union effectiveness were not just innovative individual tactics, public escalation or local militancy, but a systematic approach to understanding how a corporation was structured, the industry in which it operated, how power operated within the firm and ultimately, the vulnerabilities of the firm to organized worker power. This systematic approach, "strategic corporate research" (Juravich 2007), would be used in bargaining and organizing campaigns before the

campaigns were initiated to build an effective strategy and would be updated throughout the campaign in order to choose the most effective tactics to exploit the weaknesses identified. Unions would need to identify how power was structured both inside and outside the firm. Different strategies would be needed for internal and external actors. Unions would also need to distinguish between different functions within the corporate web. Command and control, operational and outside stakeholders all occupy important, albeit differing, roles in the firm as a whole. The location of profit centers, the firm's growth plan, key decision makers and relationships all need to be identified in order to transform strategic research into a comprehensive strategic campaign.

Strategic corporate research went beyond early models of corporate campaigns which focused on public actions and shaming but ignored the fact that power was not always held by the most visible members of the corporation. A board of directors would be able to withstand shaming or attacks on their image if the bottom line was not affected. As the USW realized through careful research at Ravenswood, boards of directors and CEO's may not even hold the ultimate control over the corporation in dispute. Direct corporate ownership was becoming less common as corporations were increasingly just one of many entities owned by multinational conglomerates (Juravich and Bronfenbrenner 1999). Strategic research meant not just knowing what a corporation looked like, but required understanding how power flowed within the corporation and building a plan to exploit those intersections of power.

Successful campaigns at BASF (1984-1990), Bayou Steel (1993-1996) and Crown Petroleum (1996-2000) all integrated environmental and community allies into campaign repertoires (Minchin 2003, Seroka 2005, Hickey 2004). The UMWA's victory at Pittston Coal in 1989 integrated sit-in's and occupations of corporate headquarters and job sites, tactics used in the 1930s but which had remained dormant

since then, into more traditional repertoires of action such as pickets and demonstrations (Beckwith 2000). Victories at Bridgestone/Firestone (1996) and UPS (1997) showed how strategic campaigns could use rank and file participation in consumer campaigns and global alliances to take on multinational corporations (Juravich and Bronfenbrenner 2003; O'Malley 1999).

The Teamsters' 1997 strike at UPS stressed the importance of internal strategies to plan and execute a strategic campaign (Witt and Wilson 1999; O'Malley 1999). Hickey (2004), in a case study of the PACE's campaign at Crown Petroleum, emphasized the need for organizational transformations within unions in order to produce sustained and comprehensive union revitalization. "Coordinating collective bargaining strategies with organizing and political action is one important step in transforming comprehensive campaigns for survival into strategies for revival. Integrating such a comprehensive approach into the union's core activities would translate the lessons of episodic struggles like Crown's into lasting strategic innovations." (Hickey 2004:18). Unions had begun to use strategic research methods and campaign tactics in individual campaigns, but in order for the success of these campaigns to be sustained they would need to be fully integrated into other areas of the union's activities such as organizing and political action. Strategic campaigns used in isolated individual bargaining or organizing campaigns could not be expected to bring the labor movement back from the doldrums of the past thirty years, instead the methodology of strategic campaigns would need to be an integrated *modus operandi* for labor in the twenty-first century.

Comprehensive campaign strategies have by no means been limited to Northern unions. Many of the central components of comprehensive campaigns such as community support, rank and file involvement and escalating tactics, have been central to Southern unions since the 1970s (Seidman 1994). More recent examples



include the 2004-2006 Argentine rubber workers' (SUTNA) organizing campaign at Neumáticos de Avanzada (Wells 2006) and the Taiwanese Chughwa Telephone Workers Union campaign (Chunghwa 2009). The Neumáticos campaign included protests outside the owner's vacation house, leafleting at car races and marches through the heart of the Buenos Aires business district (Wells 2006).

In each of these campaigns unions were forced to build unique strategies to take on their employer, rather than imitating and replicating the strategies of earlier campaigns. Only by using strategic corporate research as a methodology guiding coordinated campaigns, rather than conceiving of campaigns as a checklist of tactics to be replicated, would unions be able to have the flexibility to take on global corporations. Writing about the USW's strategic campaigns in the 1990s, Bronfenbrenner and Juravich (2001) describe strategic campaigns thus: "This evolution has not, however, reflected steady progress in a single direction, forging a unitary model for strategic campaigns. It has not been the evolution of a single, more-developed species. Instead it might best be characterized by the evolutionary concept of generalized adaptation by which a less-specialized organism can survive in many different environments, in part because it is neither as vulnerable nor as inflexible as a more highly developed form." (Bronfenbrenner and Juravich 2001: 234).

Strategic campaigns also had unique challenges. Management filed a federal RICO (Racketeer Influenced and Corrupt Organization) suit against the USW during the Bayou Steel campaign, forcing the union to spend large amounts of resources and money on lawyers and court fees (Seroka 2005). The suit at Bayou Steel was ultimately dropped after the strike was settled. RICO suits, while rarely successful, are costly to fight and divert important resources away from the campaign and are still a potential leverage point for companies trying to defend themselves against strategic campaigns. Northrup (1997) criticizes unions for "manipulating" governmental

regulatory agencies such as OSHA, the EPA and the SEC as tools in corporate campaigns.

### *Global Campaign Forms*

Cross-border union campaigns have taken many different forms. Industry, company and union structure, political climate, ideology, levels of bargaining power, and differing sets of goals are all important variables in how cross-border labor organization will be structured. While it is impossible to point to one particular form of organization as an ideal that all others should be modeled off, it is important to identify different processes and strategies that labor has used and why they were used. Cross-border bargaining and organizing campaigns will look different for a Thai garment worker than for a Canadian steelworker. To navigate the various forms of cross-border labor organization, we need a framework to identify underlying the processes unions have used to build cross-border activity.

The 1986 Shell Oil boycott was one of the earliest truly global comprehensive campaigns. While using one of the most venerable campaign tactics, the consumer boycott, the Shell campaign linked anti-apartheid activists, trade unionists, civil rights activists, politicians, church activists and consumers in a global divestment campaign unlike anything that had preceded it (Bronfenbrenner 2007). The anti-apartheid movement had used a wide array of tactics to build international pressure and enforce the UN embargo on importing oil to South Africa, but it was the central involvement of labor unions that transformed the Shell boycott from humanitarian work into a comprehensive campaign based on strategic research.

South African mineworkers at Reitspruit Opencast Services coal mine had gone on strike after a fellow mineworker was killed in an accident. Reitspruit management responded with violence, firing eighty-six workers and forcing the other

mineworkers back to work at gunpoint (Walker 1986). Reitspruit, a South African firm which exported its coal globally, was also 50 percent held by Royal Dutch Shell. The United Mineworkers (UMW) had responded to solidarity requests, not simply on altruistic grounds, but because they too had recently gone through a 15-month strike at A.T. Massey, Shell's U.S. subsidiary. Rank and file mineworkers in South Africa and Kentucky, though geographically dispersed, were connected through a common employer with a shared experience of union busting and corporate lawbreaking. Earlier "solidarity campaigns" were not uncommon, but would have focused on letter writing between union leaders, not militant rank and file tactics linked to broad political and social movements intended to inflict economic damage on one of the most profitable global firms.

The Shell boycott linked these workers and their local struggles to a coordinated global boycott against one of the most powerful multinationals in the world, but most corporate campaigns had yet to use international strategies to go beyond more traditional solidarity actions towards more comprehensive worker mobilization. The OCAW used international solidarity with German unions in its environmental critique of BASF (Minchin 2003). At Ravenswood, the USW had followed billionaire financier Mark Rich across the globe, mounting pressure on his global holdings, using the International Metalworkers Federation (IMF) and International Chemical Workers (ICEM) to coordinate solidarity actions in over a dozen nations from Venezuela to Israel (Juravich and Bronfenbrenner 1999). These campaigns used international solidarity as a key campaign tactic in a broader campaign, but these campaigns revolved around individual union locals with hundreds of workers, not entire multinational firms with thousands of workers working jointly.

By the 1995-96 campaign at tire giant Bridgestone/Firestone, the USW was able to use global mobilization as a comprehensive strategy to not only win an

individual campaign, but to build lasting power at a MNC (Bronfenbrenner and Juravich 2001). With over 4,000 workers across North America on strike at Bridgestone/Firestone, the USW (recently merged with the United Rubber Workers) had a more formidable challenge of winning a campaign against a multinational lacking in one salient vulnerability (as at BASF with its connection to cancer rates and environmental damage) on which to focus the campaign. Instead, strategy would have to be applied on multiple fronts over a much longer period of time.

Picketing in the US alone would not produce sufficient leverage to bring the company to the table; unions from across the company would have to be partners in planning and executing strategy, not just pieces of a North American centered campaign. Unions in Japan, initially hesitant at the confrontational tactics used by the USW, eventually participated in the campaign. In Belgium, Italy, and the US, regional headquarters were picketed. South American workers at Goodyear, Pirelli and Michelin held solidarity strikes and rallies. Workers and their families traveled from country to country for rallies, protests, and consumer actions to present a united front and paint a human face on the campaign. A Bridgestone/Firestone company council, designed to create sustained links between unions globally, was formed. This council provided a link from the campaign activity of the 1995-96 lockout towards a more permanent model of union solidarity and coordinated action building power at a multinational firm. The Bridgestone/Firestone council was central in a recent campaign for union recognition of Liberian rubber plantation workers (USW 2007). Sustained international coordination, targeted at strategic points in Bridgestone/Firestone's corporate structure, not just piecemeal solidarity actions, produced a winning global campaign. The USW's subsequent campaign at Continental Tire (Grevin and Russo 2003) would reaffirm many of the lessons about international coordination learned at Bridgestone/Firestone.

Similarly, the Banks and Russo (1999) case study focuses on the formation of a the Teamsters World Council at UPS (using the International Transport Workers Federation (ITF), as an international intermediary) in preparation for their 1997 bargaining campaign. Unlike the world council established in the 1995 Teamsters/Royal Ahold case (Russo 1999), which was a defensive maneuver, the UPS World Council was set up over a year before the strike started and was integrated into a comprehensive membership mobilization strategy intended to bring pressure on the global logistics firm from as many points as possible (O'Malley 1999). Management's plans to shift work from full time employees to part-time employees struck a nerve with workers across UPS and created a common issue linking workers globally and facilitating the formation of the world council.

The example of the UPS World Council is also problematic because it was formed and mobilized at the behest of North American Teamsters rather than as a long-term project based on building power across UPS's global network. It is this type of one-sided cross-border activity which may reinforce uneven power dynamics between unions. While some authors, such as Banks and Russo (1999) and O'Malley (1999), may view the 1997 mobilization as a complete success, this conclusion is only tenable if the striking North American workers are the central subjects of the analysis. These critics need to take a broader analysis of how the aftermath of 1997 campaign was experienced by workers in Europe, Asia and Latin America, not just by North American Teamsters. Has the UPS council continued its work after the 1997 campaign? Has this level of solidarity been reciprocated by North American workers for unions in the South? And perhaps more fundamentally, has this model of internationalism been used as a short-term tool to win a North American strike, or as a model for long-term power building across UPS.

Internal leadership changes within the Teamsters from its Teamsters for a Democratic Union (TDU) to more conservative leadership, less committed to internationalism as a long-term union-building strategy, has complicated the union's international mobilization strategies. The TDU's emphasis on rank and file mobilization and building international links offered an opportunity to build broader networks of power at multinationals in the logistics, distribution and transportation industries. While current leadership does devote some resources to cross-border activity, it unclear how deep or horizontal these links to unions and social movements are. More research is needed to see how the UPS World Council has operated since the 1997 strike.

The Graphic Communication International Union (GCIU) (now merged with the Teamsters in the US and the Communications, Energy and Paper Workers in Canada) integrated similar comprehensive strategies in its 2002 organizing campaign at Quebecor (Tate 2006). Combining innovative organizing strategies (house calling, in plant committees, and mobilization in unionized and non-union facilities), volunteer organizers from existing unionized Quebecor plants and public actions at Quebecor customers (Victoria's Secret and IKEA), the GCIU built a multifaceted comprehensive campaign with multiple pieces of leverage while pushing for neutrality at all North American facilities. Quebecor, a multinational commercial printing company, has facilities in more than a dozen countries. The GCIU used Quebecor's global reach in both production and distribution to its advantage in building a global solidarity campaign by engaging unionized employees and consumers across Quebecor.

In 2001 the GCIU had begun working with Union Network International (Uni, the Global Union Federation for workers in the commercial sector) and Quebecor unions globally to create a global labor standards agreement that would secure freedom of association rights and health and safety standards across the company. The

allies in this campaign for company-wide labor standards had created a foundation of trust that would be integrated into the North American campaign. The 2003 “Global Quebecor Solidarity Conference” brought both campaigns together launching a worldwide “Justice @ Quebecor” campaign (Tate 2006). Delegates accompanied organizers on house calls and hand billed outside headquarters. Coordinated global solidarity days sent the message that workers all around the world were supporting not just North American workers organizing but workers in the UK and Sweden who were threatened with layoffs as well (ORIT-ICFTU 2005). Quebecor showed that comprehensive strategies in an organizing campaign combining inside and outside strategies, union and non-union member mobilization, strategic customer outreach, and global solidarity could lead to a victory at a powerful multinational firm bent on resisting an organizing drive.

As in the case of Quebecor, UNITE’s organizing drive at the Brylane distribution center in Indianapolis integrated comprehensive membership mobilization tactics, global solidarity and customer outreach to build a multifaceted campaign at a multinational clothing company (Hannah 2006). While the Teamsters at Quebecor were able to run a customer campaign at public retailers such as Victoria’s Secret and IKEA, Brylane was a mail-order retailer with no outlets to handbill or run a public campaign. Instead, UNITE had discovered, through thorough strategic research, that Brylane’s parent company, the French conglomerate PPR, was actually the owner of haute couture brand Gucci. Brylane, one part of a multi-sector firm, was not the main profit center that Gucci was. UNITE shifted its international campaign to integrate consumer actions at Gucci retail stores in high profile locations such as New York, Paris and London. Unionized French PPR workers traveled to Indianapolis to show their support.

Rather than limiting the campaign to the US and Western Europe, UNITE connected with NGOs who monitored sweatshops in Asia to connect the clothes sold in Brylane's catalogs to grim conditions in the sweatshops which produced the clothes. UNITE made links with the Clean Clothes Campaign, a coalition of trade unions, NGOs and human rights organizations that fights to improve working conditions in sweatshops, in order to publicize the working conditions of Gucci and Brylane suppliers (Hannah 2006). Student-labor activists on college campuses were brought in through United Students Against Sweatshops (USAS). Innovative actions such as "sweatshop fashion shows" and a "sweatshop holiday catalog" were creative ways to inform the public of the global ties to deplorable working conditions in both Asia and Indianapolis and bring pressure on a diversified multinational clothing vendor. Previous cases of North American comprehensive campaigns had focused on lock-outs, strikes and bargaining support but successful campaigns at Quebecor and Brylane showed that comprehensive global campaigns could be successful in organizing campaigns as well.

But similar to the victory at UPS, campaigns at Quebecor and Brylane raise questions about unions' models of long-term solidarity. Can models of cross-border solidarity supporting Northern workers be considered victories without developing structures to extend gains to all workers at Quebecor and Brylane? Have the unions which initiated the campaigns shown similar commitment to allies in their struggles or developed structures for power sharing between unions and power building across the company? Integrating cross-border tactics into organizing campaigns is an important strategic innovation, but does not necessarily lead to long-term, horizontal relations between unions. If Northern unions are hesitant or unwilling to show similar levels of solidarity as other unions have shown for them, whether through strikes, member mobilization, resource allocation and/or power sharing structures, then categories of



success and innovation need to be reconsidered to include this. This is especially critical in cases such as Brylane involving North-South union relationships. Scholars will also need to consider how these campaigns reinforce or transform power relations between unions when evaluating the “success” of such case studies.

Turnbull (2007) examines the role of the International Transport Federation (ITF), in a sometime uneasy alliance with the regional European Transport Workers Federation (ETF), in coordinating EU-wide mobilizations against the restructuring of European port ownership. Complicating the work of mobilizing workers in a dozen nations was the need to shift the basis of dockworker unions’ repertoires of action from bureaucratic engagement (“logic of influence”) to rank and file mobilization (“logic of membership”), shifting the scale of mobilization from the national to the international (in this case EU-wide). ITF organizers needed to “reframe” issues that had previously been dealt with by local or national unions in order to “[C]reate a stronger European identity among rank-and-file dockworkers and to develop a new unconventional repertoire of collective action.” (Turnbull 2007: 130). Local networks of dockers connected with the ITF, which in turn connected to other local networks, in effect creating an EU-wide network of dockworkers based on local mobilization. With a EU-wide network based on member mobilization, dockworkers were able to put forward flexible responses as circumstances changed.

The case of Coca-Cola shows the potential for conflict in cross-border campaigns and building long-term networks, especially North-South networks. In July 2001 the USW and the International Labor Rights Fund (ILRF) filed a lawsuit under the Alien Tort Claims Act on behalf of the Colombian Food and Beverage Workers Union (SINALTRAINAL), the Colombian trade union representing the majority of Colombian Coca-Cola workers, accusing Coca-Cola of complicity in the killing of Colombian trade unionist Isidro Segundo Gil. Two years later, in July 2003,

SINALTRAINAL, working with the international coalition Campaign to Stop Killer Coke, announced a global boycott of Coca-Cola products (Chomsky 2008). This boycott has received the support of multiple unions, student activists, and community organizations, but has been actively opposed by the International Union of Foodworkers (IUF), the GUF representing foodworkers, and its union affiliates (SINALTRAINAL is not an IUF affiliate) going so far as to “strongly condemn the boycott” (Chomsky 2008: 253). The IUF has claimed that it “should be the ones to make a decision about the boycott” (Chomsky 2008:254).

The IUF for its part has dedicated large amounts of resources to organizing Coca-Cola workers internationally and coordinating meetings between Coca-Cola workers in various countries. The IUF was at the forefront of the global boycott of Coca-Cola products during the 1970s (Garver et al. 2007). The boycott in support of Guatemalan Coca-Cola trade unionists facing assassination and intimidation led to recognition of the union at the Guatemala City plant in 1980. Since then the IUF’s strategy has attempted to use existing sites of bargaining power at organized Coca-Cola facilities coupled with transnational coordination to support new organizing campaigns in countries such as Russia and Pakistan (Garver et al. 2007). The IUF has also continued to seek dialogue with Coca-Cola in drafting an agreement on human rights and trade union rights for Coca-Cola workers globally, including Colombia.

The Coca-Cola case illustrates the difficulties of building effective cross-border union networks. Political and ideological divisions between the IUF and SINALTRAINAL have not just impeded closer collaboration between campaigns, but led to sharp attacks in public against one another. Unions in the Global North such as the Teamsters have simultaneously supported the campaign to end the assassination in Coca-Cola workers in Colombia by pushing for disinvestment from banks underwriting Coca-Cola while at the same time expressing concern about the effect of

a global boycott on unionized facilities in North America (Correa 2004). Other federations such as the Canadian Labor Congress (CLC) have made public statements in support of SINALTRAINAL and the lawsuit against Coca-Cola, but adhered to the IUF's position against the boycott (Chomsky 2008). The problematic question for SINTRAINAL and other independent unions remains one of how to build sufficient leverage at global corporations such as Coca-Cola without the support of GUFs and their union affiliates when these affiliates represent critical leverage in Coca-Cola global operations. The issues are especially salient when the lives of workers are in immediate danger of assassination and kidnapping.

### *Sweatshop Solidarity Campaigns*

Sweatshops, long the universal symbol of deplorable, unsafe and low wage working conditions in the late nineteenth and early twentieth century, have become a central site of transnational union organizing campaigns in recent years. Early campaigns against child labor and forced labor became public reform movements after high profile catastrophes such as the 1911 Triangle Shirtwaist Fire. By the 1970s sweatshops as a form of garment production reappeared in Latin America, the Caribbean Basin, Southeast Asia and Southern California. Nations reeling from debt crises and structural adjustment programs had turned to export processing zones (EPZs) for growth industries. EPZs were tax-free industrial havens for multinational firms to assemble low value products such as garments, textiles, electronics and toys employing a low wage, mainly female workforce. Aided by free trade agreements and a system of subcontracting and global production, sweatshops became the symbol of both high fashion apparel lines in the Global North and the face of a race to the bottom for the economies of the Global South.

Anti-sweatshop campaigns solidified themselves in the public consciousness after UNITE's 1996 campaign to organize Los Angeles Guess? garment workers (Bonacich and Appelbaum 2000). After Guess? announced it would close its production facilities in LA and move them across the border to Mexico, organizers were quick to highlight the willingness of business to offshore production at the whiff of labor organizing. Unions, NGOs and the US Department of Labor attempted to mount public pressure on Guess? by highlighting sweatshop conditions in Mexico, but a relaxing of regulation on investment after NAFTA gave North American manufacturers free reign to either move production at will or, more likely to threaten to move production in order to scare workers who dared to organize. The situation was similar in other parts of the world. In Latin America, the Caribbean, and East Asia, sweatshops became the preferred engine of growth for countries at the bottom of the global pyramid. Public cases of child labor (Kathy Lee Gifford and her Wal-Mart line) and suburban sweatshop slavery (El Monte, California) brought the global reach of the garment industry into Middle America's homes, proving that a small, well-organized North American NGO could occupy a strategic position between workers in the Global South and consumers and activists in the North.

Workers, mainly young women, organizing in places like Guatemala, Thailand and Haiti began global solidarity campaigns, as much out of structural necessity as out of tactical innovation, to win improvements in individual garments factory organizing campaigns as well as to increase pressure for industry and retailer-wide codes of conduct. Workers on the ground, independent national labor unions, transnational NGOs, Northern labor unions, consumer activists and North American university students formed a multi-layered "Transnational Advocacy Network" of on-site organizing, transnational communication, and advocacy at the site of consumption, forming a "boomerang effect" (Keck and Sikkink 1998; Anner 2004). These networks

used pressure at the sites of production combined with publicity campaigns on big name brands such as Nike, Reebok and Liz Claiborne as well as popular retailers such The Gap and Wal-Mart.

Frundt (2002) posits four models of cross-border maquila organizing: “coalitional,” “federation to federation,” “international campaign organizing,” and “clandestine targeting.” Federation to federation organizing involves community and NGO support for local organizing, but established union federations play a central role in initiating and fostering organizing projects. This type is typified by the UE-FAT partnership (Alexander and Gilmore 1999). International campaign organizing uses the power of transnational NGOs and transnational advocacy networks to bring highlight local sweatshop conditions and build consumer pressure in Northern countries (Anner 2000). Clandestine targeting involves building a militant cadre of activists on the ground to expand into other factories in the sector or region (Armbruster-Sandoval 2005).

The model of “coalitional” organizing is based on “the construction of alliances on the basis of preexisting networks” (Frundt 2002: 49) and exemplified by the Coalition for Justice in the Maquilas (CJM). Formed in the late 1980s by religious, labor and community groups (including the AFL-CIO and the Canadian Labor Congress), the CJM coordinated a broad network of organization in maquila communities. Because of its own roots as a coalition, not a labor union, the CJM was primarily devoted to education, advocacy and support. Member groups such as the Comité Fronterizo de Orbreras (CFO) used worker centers as safe meeting places to discuss workplace issues (necessary in an environment of management repression and company unions). Educational programs were run for workers concerning labor law, overtime rules and maternity leave rights (Frundt 2002: 49). But the CJM’s role as a coalition was important because it played a mediating role between local rank-and-file

organizations and transnational NGOs and Northern labor unions. Frundt notes that while high levels of collaboration between coalition members increased the likelihood of organizing victories (Williams 1999), it is rarely enough without strong labor union support (Frundt 2002:51).

Frundt emphasizes the need for bidirectional relations in order to build sustained coalitions. He faults most maquila organizing attempts as “one-way processes” focusing on the Latin American side of campaigns. For longer-term successes, workers on both sides of the border need to be involved in organizing campaigns and go beyond vague solidarity for distant workers to a “principled self-interest” (Alexander and Gilmore 1999: 258). The UE-FAT Strategic Organizing Alliance is one of the most mature and well-known attempts at long-term cooperation. Both are independent unions with deep commitments to rank and file democracy. Founded in 1992 after the federations had collaborated on anti-NAFTA campaigns, the alliance targeted transnational corporations operating in Mexico that had a bargaining relationship with the UE in the US (Alexander and Gilmore 1999: 258). The ultimate goal of the alliance would be organizing new members and attaining tangible benefits for members on both sides of the border. Both unions realizing that circumstances were unfavorable to quick campaign victories, have committed resources to the long-term cooperation through bidirectional education, worker-to-worker exchanges and campaign cooperation. Rank and file members of both unions needed to become internationalists in order to commit their resources and dues to workers thousands of miles away.

Anner (2000) compares three cases of transnational solidarity campaigns in Guatemala and Haiti to “[S]uggest that campaigns with a weak or nonexistent international component will fail or meet with limited success. However, these cases also suggest that international support can never replace sustained organizing efforts

by local actors at the point of production.” (Anner 2000: 248). Each case featured a local subcontractor bent on fighting an organizing drive, the presence of international allies (NGOs and unions) and a vulnerable retailer or brand name. For campaigns to succeed a combination of local and national union support along with committed and adroit Northern allies would be needed.

Armbruster-Sandoval (2005) expands on Anner’s (2000) work with more in-depth case studies focusing on the mixed outcomes in Central American sweatshop solidarity campaigns. Successful high profile campaigns that had been run at PhillipsVan Heusen and The Gap were mixed victories, with initial successes in gaining either pay raises or improved working conditions, but over time, these victories proved ephemeral. Where Anner (2000) had focused on the strength of the local union campaign and the effectiveness of transnational network advocacy, Armbruster-Sandoval (2005) sees the degree of corporate vulnerability as an important factor in transnational sweatshop campaigns. Strong local unions and dense transnational networks were not “necessary and sufficient” conditions for success (Armbruster-Sandoval 2005: 144). Likewise, as in the case of The Gap in El Salvador, a retailer with a well-known image to protect may be vulnerable solely on its image, even without strong local campaign roots or a dense transnational network. “The most optimal scenario for raising wages and improving working conditions involves moderate/high corporate vulnerability, high local union strength and moderate/high TAN unity” (Armbruster-Sandoval 2005: 146).

Robertson and Plaiyoowong’s (2004) case study of the transnational solidarity campaign at the Gina Bra Form company in Thailand reiterates Armbruster-Sandoval’s (2005) findings that a well-organized combination of local activism, transnational allies and corporate vulnerability are keys to success adding that national union support and resources, not just local militancy, were important in sustaining

local victories. The authors also stress the need for “midfielders,” activists who can “see the entire field’ and works to ensure that local union views (conveyed in the local language) are placed at the centre of international strategy discussions” (Robertson and Plaiyoowong 2004: 5). The role of the “midfielder” as a person who links various groups, often coming from unfamiliar repertoires of action, during an activist campaign is echoed later by the role of “bridgebuilders” (Tattersall 2007) and “brokers” (Tarrow 2005).

All of the authors are realistic about the possibilities of sustained, long-term victories at individual garment factories without raising industry-wide standards. The overwhelming power of capital to move production (or make credible threats to move production), corporate intransigence, and weak independent labor unions in the garment industries of these nations all create precarious foundations for long term sweatshop organizing (Armbruster-Sandoval 2005). Transnational campaigns have created high-profile successes in Latin America and Asia, but broader industry- or company-wide regulatory structures, political victories in national governments, and systemic global justice campaigns will be needed in order to make more far-reaching gains for workers at the bottom of the global production chain (Armbruster-Sandoval 2005; Bronfenbrenner 2007).

Special attention must be paid in global campaigns involving low wage Southern workers and more privileged Northern organizations so not to reproduce gender and class inequalities in the relationships of solidarity. Some authors have pointed to the US labor movement’s history of manipulation and outright imperialism in its international endeavors (Thomson and Larson 1978; Johns 1998; Herod 2001). Others have pointed at the tensions between Northern NGOs and Southern campaign activists to show how Southern activists have asserted their positions as equal partners in global campaigns (Hertel 2006). Some authors have tried to find solutions to the



unequal relationships in sweatshop advocacy campaigns. Anner and Evans (2004) suggest that the changing nature of the North American workforce, specifically unions' new efforts to organize women and immigrant workers may be affecting how the terms of engagement with Southern activists are renegotiated. Broader issues of global governance, i.e. the global justice movement, may also affect Northern coalition building. Compa (2004) reminds unions and NGOs that each has more commonalities than differences and identifies codes of conduct as valuable points of common involvement.

The renegotiation of power through union campaigns is not just a feature of workers in the Global South. Campaigns such as the Justice for Janitors (JfJ) campaigns in Denver, Los Angeles, Houston and Miami, and the Los Angeles drywallers campaign may be seen as “global” campaigns because of the prominent role immigrant workers have played. These “global” workers are central actors in the remaking of power dynamics not simply because they are mostly (female) immigrants from Central and South America (many bringing traditions of labor and community organizing with them) in a traditionally white (and male) union structure, but because of the way in which these workers have remade local unions and challenged existing leaderships (Milkman 2006; Albright 2008). Community-based strategies such as the JfJ and drywallers campaigns have remade cities such as Los Angeles, reasserting the voice of labor both in City Hall (through the election of pro-labor councilmembers and Mayor Antonio Villaraigosa) as well as in the *barrio* (through the Latino-ization of new regions of the city) (Davis 2001).

### *Community Responses*

Globally linked, low wage industries such as textiles, apparel manufacturing and electronics assembly tend to be located in developing nations with majority

female workforces. These industries are dependent upon strong state-capital alliances to maintain a disciplined workforce and promote a friendly investment climate for MNCs. Attempts to organize unions may be met by overt repression through physical violence, threats and firings or by legal restrictions of worker activity through bans on strikes, demonstrations and meetings. Work in Export Processing Zones (EPZs) and *maquiladoras* is often atomized to ensure minimal worker to worker contact on the job and shop floor discipline is enforced through local management control (McKay 2006). This type of control regime provides little space for worker resistance on the shop floor and moves the site of organization and resistance into the community where these workers live. Workplace issues such as wages, hours, forced overtime and unsafe working conditions remain central to organizing efforts, but become mixed with issues of gender inequality, child services, domestic violence and housing and land rights.

A different model of cross-border campaigns that relies more heavily on local organizing and community-based support may be emerging from unions in these industries. This model of labor organization mixes local, community-based structures with links to transnational labor groups, NGOs and Northern labor unions. Local labor organizing is embedded in community support structures such as housing and water defense groups, women's centers, and progressive church organizations rather than being strictly based around in-shop collective bargaining. Many of these community organizations have been involved in pro-democracy movements or struggles around housing and land tenure and provide a wide network of allies and repertoires of actions that have been successful in a specific community (Seidman 1994).

In many of these nations official unions either have monopolies on representation or are unresponsive to organizing in low wage industries (either because of patriarchal ideologies or because existing unions may rely on state-capital

alliances) making independent union organizing extremely difficult. Unions in these marginalized sectors cannot rely on traditional collective bargaining models for workplace representation and instead build power locally through links with community allies and globally through transnational labor networks. This intimidating context of management opposition and indifference of established trade unions towards organizing often makes joining a trade union an option of last resort. Community groups, which focus on issues of gender and housing, provide a more receptive setting for bringing workers (especially women workers) together and talking about how to change their workplace (Gunawardana 2007).

But the local support of these organizations alone is rarely sufficient to defend workers against the threats of highly mobile industries such as apparel manufacturing and electronics assembly. To augment the local support provided by community organizations, workers have connected with international labor rights organizations which are able to link workers in the Global South to unions, students and NGOs in the Global North. GUF's, labor rights NGOs such as National Labor Committee (NLC), Clean Clothes Campaign (CCC) and the Transnationals International Exchange (TIE) and direct union-to-union networks integrate workers into global solidarity networks (Keck and Sikkink 1998).

In response to these conditions, workers have attempted new strategies for building power at the most vulnerable node in the global production chain. In Gunawardana's (2007) article on union organizing in Sri Lanka's EPZs, workers at a garment factory, Jaqalanka Ltd, were forced to bypass official industrial relations channels such as the labor ministry and official unions (who had not been interested in organizing women in EPZs) in order to achieve representation and win their annual holiday bonus. The workers, almost all female, collaborated with the local women's center for training, leadership, material support and a safe space to meet and plan

union activities. The women's center had provided support for other EPZ workers in the region who had previously attempted to organize independent unions and were able link the workers at Jaqalanka to labor NGOs in the region and North America. Through these links with NGOs and trade unions, workers at Jaqalanka aired their case to consumers of their products in the US and Western Europe and investors in Jaqalanka's parent company, VF Workware (which owned denim brands such as Lee and Wrangler). Although initial attempts to organize a union through government ministries and seek representation through existing trade unions were cut off, Jaqalanka workers instead linked with community organizations that had broad international ties. These international ties brought a new axis of leverage to the local fight in the EPZ. The combination international ties with deep local roots in women's and community groups built a strong base for rank and file organization, keeping pressure on the company in the community (and building a foundation for future collective activity) while at the same time building an international network of allies to reach consumers and investors in the Global North.

Much like Gunawardana's (2007) example of Sri Lankan EPZ workers organizing around issues gender and community, women workers in the Latin American banana industry (Frank 2005) have combined local and international strategies to organize for better conditions both on the job and in their communities and homes. Unions in the Latin American banana industry have existed since the 1950s (originally as US-promoted, anti-communist bulwarks against more militant union organizing efforts) providing a foundation for current organizing. Through a cross pollination with feminist and national liberation struggles in the 1970s and 1980s, women workers have established structures within these unions such as women's caucuses and education programs and women have been elected to

(traditionally male) positions of power as well as having added contract language for maternity leave, equal pay and rules against sexual harassment.

In 1993 trade union leaders from Nicaragua, Guatemala, Panama, Honduras, Colombia and Costa Rica met to establish COLSIBA, the Central American network of banana workers (Ecuadorian unions joined in 2000). By providing a regional network for employees in the banana industry women from these seven nations were able to meet regularly, communicate and share local experiences and build a more powerful women's organization throughout the sector. Their struggles in the banana plantations connected them to more regional campaigns against free trade agreements such as Central American Free Trade Agreement (CAFTA), the Free Trade Agreement of the Americas (FTAA) and Plan Puebla Panama (PPP).

COLSIBA was institutionalized as a collective bargaining agent through the IFA signed in 2001 at Chiquita. The IFA covered all Chiquita workers in these seven nations and provided contract language supporting collective bargaining rights. The IFA was supported by the International Union of Foodworkers (IUF) providing the unions in COLSIBA with financial and logistical support. Other NGOs, solidarity organizations and labor unions such as US Labor Education in the Americas (US/LEAP), the AFL-CIO Solidarity Center and European NGOs Banafair and Banana Link all provide crucial links for international solidarity outreach to the nations where bananas are exported and consumed. These links to Northern unions and NGOs also provide important financial and logistical support for international travel and conferences to meet other banana workers globally and coordination for transnational campaigns to end local labor disputes.

One of the most advanced examples of this multiscalar approach to union organizing is the UE-FAT partnership (Hathaway 2000). The UE-FAT alliance, which has focused organizing and education efforts in the maquila sector of the US-Mexico

border, has opened a joint-run workers' center in Ciudad Juarez to "[E]ducate workers about their rights, provide legal assistance designed to promote the development of workers' organizations, and consistently put forward a different vision of how unions should and could operate" (Alexander and Gilmore: 260). The UE-FAT alliance is built along ideological, industrial and geographical lines and sustained by developing structures that involve workers from both sides of the border in the alliance.

The examples in Gunawardana (2007), Frank (2005), McKay (2006) and Hathaway (2000) illustrate attempts at building multi-scale labor organization combining deep roots in workers' local communities with links to international allies. Highly repressive factory regimes, unresponsive established trade unions and vulnerable positions in global production chains create a unique set of challenges for workers trying to organize unions in these industries. By incorporating local struggles around community, housing and gender into labor organizing, these workers have been able to build a broader discursive and material foundation for pressuring employers on a local scale. When this foundation in local organizing is linked to international allies in the Global North, a transnational network is formed connecting shop floor labor disputes to global solidarity networks. Rather than relying upon Northern allies to intervene and "save the day" for Southern workers, local organization ensures that potential power imbalances between local workers and international allies can be offset. Global campaigns to end abuses in EPZs and *maquiladoras* must have strong roots in the lives of the workers involved, not rely solely on international media campaigns run by Northern allies.

### *Strategic Alliances and World Councils*

Meyer (2001) analyzes the history of international bargaining attempts at General Electric (GE) over the past 45 years. As GE is truly global and committed to

its own mobility, refusing to be tied to one location or workforce, unions must deal with a fragmented workforce spread across geographical space as well as diversified industrial lines. This poses serious organizational and operational challenges to any organization trying to formulate a cohesive agenda and mobilize transnationally. The GE Coordinated Bargaining Committee (CBC) began as an attempt to pressure GE to bargain collectively with national unions (US and Canadian) across the various industries and crafts represented at GE (disparate unions such as the American Flint Glass Workers and the American Federation of Technical Engineers alongside machinists, electricians and sheet metal workers) (Meyer 2001: 66-67). Before there was international competition there was the threat of union whipsawing on a national level and a need for unions to go beyond traditional bargaining forms and formulate a labor agenda at the table. From this success at forcing GE to bargain nationally, the International Metalworkers Federation (IMF) worked with the CBC to begin initial forays into the possibilities of international bargaining and coordination. International CBC meetings have occurred sporadically since 1967 and evolved from intermittent high-level meetings between national union leaders into a more strategic and cohesive model emphasizing international cooperation at multiple levels of union organization.

Tattersall (2007) examines the recent work done by SEIU to create “Global Union Alliances.” Arising out of the need to build leverage in local bargaining and organizing fights and the desire to move beyond individual requests for solidarity on a campaign by campaign basis, SEIU’s alliances have been made with other union federations (specifically the UK’s Transport and General Workers (T&G)). Longer-term partnerships are designed around three goals. First, the coordination of specific campaigns, especially new organizing campaigns. SEIU has done this most prominently in its “Driving Up Standards” 2004-2005 campaign to organize school bus drivers at private contractor FirstStudent (a subsidiary of UK’s

FirstGroup). Second, global alliances are designed to build capacity for all unions involved, not just SEIU. This echoes Frundt's (2002) need for "bidirectionality" in cross-border organizing campaigns. In the case of the FirstStudent campaign, this has involved SEIU sending organizers to the UK to train T&G organizers in SEIU's organizing model. SEIU has done similar exchanges with the Australian Liquor, Hospitality and Miscellaneous Workers Union in Australia in its "Clean Start" campaign to organize building service workers in Australia and New Zealand (Tattersall 2007: 162-163). Third, SEIU's global alliances have worked closely with GUFs to strengthen their organizing capacity. Because unions are primarily organized around the national level, the role of GUFs as the international interlocutor is important for long-term stability and continuity.

Other unions have criticized SEIU's methods in building global alliances claiming the "[L]earning process between SEIU and the T&G is less than mutual" and "[E]ngagement is sometimes seen as a one-way street where SEIU is the teacher and the UK unions are the students" (Tattersall 2007: 170). There have been difficulties translating SEIU's confrontational style to unions that have cultivated and depend on long standing relationships with firms. SEIU has less to lose by using more antagonistic tactics as an outsider than do the indigenous unions who will have to deal with companies after SEIU leaves. Tattersall remains optimistic that these differences can be overcome through experience, patience and negotiation (Tattersall 2007). Within SEIU, there are concerns that the global alliances may have more breadth than depth (2007: 172)

Cohen and Early (2000) use three case studies in the telecommunication industry to showcase the various alliances the Communication Workers (CWA) have built with allies. Faced with a combination of privatization and deregulation, telecom unions have lost the local control previously used as leverage over firms.



Transnational giants such as British Telecom, Nortel and Sprint have diversified their holdings beyond their national origins, leaving local unions with less bargaining power over firms. As a means to combat this, the CWA has built alliances with Canadian, British, Mexican and Taiwanese union federations assisting in organizing campaigns, strike solidarity and worker exchanges. In order to build coordinated power at telecom multinationals these alliances will need to be combined with innovative cross-border organizing and bargaining tactics and take advantage of the strategic position of telecommunications in global information networks. Actions such as the “virtual strike” by unions in the IBM global network have exploited the strategic position to build leverage (Uni Union Network 2007). The cross-border campaign by the Chunghwa Telecom Workers Union integrated international solidarity (with the CWA, telecom unions and the GUF, Uni) with local militance to halt the privatization of the state-owned Chunghwa Telecom (CWA News 2006; CTWU 2009).

Other global networks have gone beyond union-union alliances and included other social movements to challenge the multiple logics of capital accumulation. The Rio Tinto network links unions, GUFs, environmental advocacy, indigenous rights organizations and human rights groups in what Goodman (2004) calls “cross national social movement unionism” (2004: 106). Beginning in 1996 with an international corporate campaign designed to “politicize Rio Tinto, defining it as a global pariah” (2004: 113), the network is made up of overlapping levels of activity. A trade union network coordinates unions representing Rio Tinto workers globally. A public campaign, including films, a cyber campaign, and an information database are designed to educate the public and counter the influence Rio Tinto has over media with an unfiltered message. Third, community and environmental groups build local pressure in communities affected by the effects of Rio Tinto’s mining operations,

especially indigenous communities dealing with displacement. A fourth track, building a shareholder campaign, was inaugurated in 1998 (2004:114-115). This broad based approach to confronting Rio Tinto has taken advantage of the multiple logics MNCs, especially in the extractive industries, depend on to produce profits. More research is needed to see how the Rio Tinto network has incorporated other unions in industries associated with the products extracted by the firm. Networks in the extractive industries would seem especially suited to organizing vertically along commodity chains as well as horizontally with other social movements.

### *International Framework Agreements (IFAs)*

Over the past decade attention has turned to Corporate Social Responsibility (CSR) as alternative mechanism for unions and consumer groups to regulate the power of corporations on an international level (Crane et al 2008). The need to ensure equal standards across firms has increased due to both the internationalization of corporations to stretch across geographical boundaries as well as corporate campaign tactics unions and other consumer groups have used to highlight disparities between a corporation's public image and actual behavior. While CSR, especially in the form of "codes of conduct," has been held up by some as an effective mechanism to ensure fair treatment, these codes of conduct are non-binding statements more often used to promote a company's positive self image to the public rather than binding agreements with labor, environmental and human rights organizations. Codes of conduct are also unilateral, written and signed solely by the corporation without input from external groups affected by the corporation's policies or enforcement procedures to ensure compliance with the code.

As an alternative, many unions have promoted International Framework Agreements (IFA) as more effective and participatory structures. IFAs are multilateral

agreements, signed between the corporation and a union, usually one of the GUF's, at a global level in order to ensure equal standards across a firm. Stevis and Boswell (2007) identify three goals of IFAs. First, they must guarantee Core Labor Standards (CLS) such as abolition of child labor, non-discrimination and freedom of association. Second, they should cover all employees, including workers who are subcontracted or employed by subsidiaries and suppliers of the firm. And, third, IFAs should be designed to establish an institutionalized relationship with the firm at (at the very least) a corporate level and ensure some form of "arrangements for interactions, monitoring and implementation" (2007: 181). IFAs have been signed at fifty-five firms (2007: 174), varying in sector and size, though all but two are European (US-based Chiquita and the South African mining firm, AngloGold) and provide for varying levels of participation and representation from unions throughout the firm.

Ultimately IFAs provide a foundation from which to approach regulating transnational capital, not an end in itself. IFAs are not international collective bargaining agreements, i.e. there is no international body to enforce these agreements, and in the end IFA's are only as strong as the unions that sign on to them. Stevis and Boswell (2007) conclude that while IFAs may help initiate vertical links to corporate offices and horizontal links to other unions representing workers at the same firm, in order for them to work they must be connected to broader comprehensive global campaigns. If IFAs are treated as an end to be attained for themselves rather than as a tool in the repertoires of comprehensive campaigns, they will end up more like watered down codes of conduct than enforceable collective bargaining agreements.

Unions have used IFAs as tools in organizing campaigns with varying degrees of success. Wills (2001) surveys the effects of the IUF-Accor IFA in different countries. In the US, Canada and Indonesia it has been used as leverage in organizing hotel workers. In Australia it helped build horizontal links between hospitality workers

and building trades unions seeking representation at new hotel sites. In Africa the IUF was able to bring together the first conference of Accor affiliate unions to exchange information and strategies. While the IFA has not guaranteed neutrality in organizing campaigns or guaranteed access to worksites, it has given unions an extra tool to use strategically in building both vertical and horizontal links. Or, as the IUF Executive committee wrote in 2000 “IUF agreements are in essence about organizing and bargaining for ‘space’. The work of the IUF in this area is best seen as international bargaining aimed at protecting and enlarging the space in which IUF affiliates organize and bargain” (quoted in Wills 2001: 685). IFAs cannot substitute for well-disciplined organizing and bargaining tactics, but may add another tool in unions’ repertoires of comprehensive campaigns.

The cross-border and community work of unions in the Latin American banana industry has already been discussed (Frank 2005). Frundt (2007) examines the numerous strategies banana unions have employed to fit circumstances. Having signed a historic IFA with Chiquita in 2001 (the first in an agricultural and non-European MNC), COLSIBA has used the IFA to combat rounds of layoffs and facilitate organizing Chiquita suppliers, though results have been mixed. In some regions local unions have seen an improvement in labor relations, while in other places management has continued with anti-union activities. Other major Latin American banana producers, DelMonte and Dole, have refused to sign IFAs.

### *Challenges to Building Global Networks*

Not all attempts at building lasting cross-border networks have been as successful as the previous examples. Industries such as the hotel and auto parts industries have been plagued by internecine fighting, mistrust and national chauvinisms that have inhibited the formation of long-term union coalitions and cross-

border campaigns. Unions at the Starwood hotel chain in North America have been successful at building regional and national organizing and bargaining strategies. Starwood Hotels in Europe have been able to coordinate through the structure of European Works Councils, but lacking such an institutional framework in North America, unions have been stymied in attempts to engage in cross-border campaigns (Brenner 2007). The IUF's work with unions in the Accor chain have shown that cross-border coordination can occur in the hotel industry, but only with the long-term commitment of unions involved (Wills 2002).

Models of cross-border networks in the auto and auto parts industries have been well-documented (Alexander 1999; Hathaway 2000; Anner 2004), but not all of these attempts have been successful. Babson and Juarez (2007) document the "International Research Network on Autowork in the Americas" (IRNAA) which began as an academic research network and grew to become an important coordinating body for US, Canadian and Mexican unions. Continental integration through trade agreements such as NAFTA, lean production methods and integrated production chains have integrated unions in these three nations into regional markets of production while at the same time have produced only halting attempts at cross-border coordination. While Alexander (1999) and Hathaway (2000) have described the cross-border work the UE has done with the FAT but the UAW, the largest auto union in the US, has been reluctant to commit resources and money towards long-term cross-border activity.

The industrial relations system of Mexico with its corporatist origins and the embedded position of labor unions in the ruling PRI (*Partido Revolucionario Institucional*) party's system of political patronage have hindered coordination amongst unions within Mexico. This has left Mexican auto unions wishing to engage in cross-border work to do so independently, without the resources or bargaining

power needed to build broad-based networks within multinational firms (Babson and Juarez 2007). Corporatism, union competition, a lack of trust amongst unions, tepid support from the UAW and the weak institutional position of the IRNAA network itself have all hindered the growth of a North American network in the auto industry (Babson and Juarez 2007: 37-39).

## **II. USW and CUT Internationalisms**

### *USW Internationalisms*

Arising out of the upsurge in industrial union organizing following the passage of the National Labor Relations Act (NLRA) in 1935, the USW (known as the Steelworker Organizing Committee (SWOC) between 1936-1942) was formed in 1942. The USW's collective bargaining activities remained primarily focused on pattern bargaining agreements at domestic steel and manufacturing firms such as US Steel and Kaiser Steel, which dominated the North American market (Clark et al. 1987). Pattern bargaining provided a solid foundation for USW gains at the bargaining table from the 1960s until the 1980s when concessions and the aggressive use of permanent replacement workers during strikes set unions on the defensive (Rosenblum 1995). By the 1990-1992 campaign at Ravenswood and 1995-1996 campaign at Bridgestone/Firestone, the USW turned towards more aggressive, and international, strategies of its own to contend with management's continued pressure for concessions. The USW used international solidarity, company and industry councils, and strategic partnerships with other unions around the world to increase its bargaining position with firms. At the same time, the USW has offered solidarity to unions such as the Mexican Sindicato Nacional de Trabajadores Mineros, Metalúrgicos y Similares, known as Los Mineros, the Brazilian CUT and the Mexican FAT in their campaigns (USW@Work 2006a).

Organizational change has come rapidly since the mid 1990s with mergers to United Rubber Workers in 1995, Industrial Woodworkers and Allied Union in 2004, and PACE (themselves a 1998 merger of the OCAW and UPIU) in 2005. The USW signed an agreement with the UK/Irish Unite the Union in July 2008 to form the first global union, Workers Uniting. It has been at the forefront of developing new strategies for global trade unionism (Needleman 2008). The USW's international strategies have developed over nearly 20 years through comprehensive campaigns, worker exchanges and education, political advocacy and involvement in global union federations (GUFs).

The current USW is the product of multiple mergers of industrial unions in the rubber, chemicals, paper, steel and nuclear industries. It reflects the diverse histories, organizational cultures and memberships of industries most acutely affected by the shifts in the manufacturing sector over the past twenty-five years. Some industries, such as oil refining, steel and aluminum production are directly linked to extractive industries and mining. These global industries connect North American workers to counterparts in Africa, South America or Australia through commodity and production chains. Offshoring, plant closings and the threat of international whipsawing have focused the USW on issues of trade and the decline of the North American manufacturing sector. Mergers and the internationalization of corporate ownership into complex webs of subsidiaries, joint ventures and holding companies have impelled the USW to use more sophisticated research methods to understand the ultimate sources of corporate power. Environmental activism and worker health and safety concerns have built links with environmental and community organizations. Globally integrated industries such as steel, mining, aluminum, oil and paper have brought recognition of the struggles of workers in other nations and the power international solidarity has for workers at home and abroad. Newer, more innovative

campaign tactics were needed to build bargaining power in increasingly global industries such as steel, oil and mining.

### *Campaigns*

The USW's initial forays into cross-border activity began as pragmatic comprehensive campaign strategies. The OCAW's campaign to end the five-year lockout of workers at a Louisiana BASF facility taught early lessons about the need for local solidarity, community outreach, and the need to broaden the union's base of allies (civil rights groups, German Green Party) in order to take on a powerful MNC like BASF. It also taught the OCAW the difficulties of building international solidarity: language barriers, lack of established relationships with unions overseas and working with unions (IG Chemie) who did not share the same ideological commitment to comprehensive campaigns (Minchin 2003).

The USW's campaign at Ravenswood (1990-1992) took locked out workers from West Virginia to Zug, Switzerland, chasing billionaire financier Marc Rich to his safe haven and gathering support from local Swiss politicians. Rather than simply focusing on the figurehead of Ravenswood's global chain, the USW followed Rich's money trail to banks in the Netherlands, aluminum smelters in Venezuela, luxury hotels in Romania and oil trading in Finland; namely anywhere where Rich had financial investments (Juravich and Bronfenbrenner 1999). The USW would make allies with local and national unions in order to build escalating pressure on Rich's financial empire. This willingness to use international solidarity as a campaign strategy, while initially pragmatic, would become established within the USW's organizational makeup over subsequent comprehensive campaigns.

The OCAW and later PACE would be involved in solidarity campaigns to support jailed union leaders in Nigeria (OCAW Reporter 1995), passing resolutions at



the convention in 1994, hosting speaking tours of Nigerian unionists and organizing protests outside the Nigerian embassy (OCAW Reporter 1998). The OCAW was involved in the campaign to boycott the Burmese junta because of human rights abuses by the military dictatorship there. The OCAW used its leverage at oil companies such as Unocal, Texaco and ARCO to push for divestment (OCAW Reporter 1997; 1998).

During the Bridgestone/Firestone global campaign (1994-1996), the USW used global outreach coordinating work stoppages, protests and international days of action in over a dozen countries (Juravich and Bronfenbrenner 2003). The First World Conference on Bridgestone, a gathering of unions involved in the solidarity campaign, would evolve over the next ten years, through the support of the ICEM, into a worldwide network of Bridgestone/Firestone unions across the world able to coordinate information and strategy exchanges (ICEM 2008).

Likewise, the 1999 campaign at Continental Tire (Greven and Russo 2003) would involve bringing striking workers from North Carolina to Germany, Slovakia, France, Turkey and Scotland to meet fellow trade unionists face to face and sustain pressure on the German MNC (Steelabor 1999a). These exchanges during the global campaign would build the foundation for future USW solidarity with striking Mexican Continental Tire workers (Steelabor 2001). During the 1998-2002 global campaign at Titan Tire the Uruguayan Rubber Workers Union (FUNSA) would play a strategic role in bringing about a settlement (Steelabor 1999b; 1999c; 2002b). PACE's campaign at Continental Carbon was successful in part due to hunger strikes and the support of Taiwanese petroleum unions (PaceSetter 2002).

As in the campaign at Gerdau, the USW would use the comprehensive campaign both as a pragmatic tactic in building in winning the conflict at hand as well as a springboard for building long-term relationships with other unions globally.

Comprehensive campaigns such as Bridgestone/Firestone, Continental Tire, Titan Tire and Continental Carbon built trust through struggle and established common repertoires of action that may be used in future campaigns. Solidarity campaigns to end human rights abuses against trade union leaders struggling against military dictatorships broadened the union's scope of engagement from bread and butter issues to issues of human rights.

### *NAFTA*

Opposition to the North American Free Trade Agreement (NAFTA) between 1992-1993 led the USW to build relationships with independent labor unions in Mexico. Most notably this has meant an early alliance with the FAT (Hathaway 2000). FAT had built solidarity networks with the United Electrical, Radio and Machine Workers of America (UE) at the same time, proceeding to pursue cross-border organizing strategies as well as lobbying against NAFTA.

Supporters of NAFTA who claimed it would bring jobs to Mexico accused US and Canadian labor unions of being either shortsighted (as NAFTA was touted to be an export boom for US manufacturers) or as selfish protectionists who only cared about their own jobs and not those of Mexican workers' (MacArthur 2000). Unlike official labor unions linked to the Institutional Ruling Party (PRI) which supported the free trade agreement, the FAT opposed NAFTA on the grounds that negotiations which excluded labor unions and social movements would not reflect the interests of the majority of workers. Mexican unions and social movements founded the Mexican Action Network Confronting Free Trade (RMALC) (Hathaway 2000). FAT leaders came to Pittsburgh in 1993 to present their opposition to NAFTA to the USW Executive Board (Steelabor 1993).

The collaboration with the FAT during the campaign against NAFTA would build a foundation a broader alliance to develop cross-border organizing strategies. In 1997 the FAT, Teamsters, UE, UPIU, CAW, UNITE (Union of Needletrades, Industrial and Textile Employees) and the USW would form the Echlin Workers Alliance. This alliance was formed to organize workers across Canada, the US and Mexico at Echlin, an auto parts company later bought by Dana Corp (The Paperworker 1998; Hathaway 2000).

### *Steelworker Humanity Fund*

After the passage of NAFTA in 1993, North American unions began to feel the repercussions of capital mobility through plant closures and, more often, the threat of plant closures. This led the USW to look at where jobs were moving, the quality of conditions of these jobs and who would be working in these jobs. Union members in North America wanted a way to meet the workers who would be working these jobs in order to get a better understanding of the processes of globalization and its effects on workers throughout the global production chain. Out of this need to link with workers in other parts of the world came initiatives of the Canadian Steelworker Humanity Fund (Marshall and Garcia-Orgales 2006).

Originally created in 1985 as a way to raise funds for victims of famines in Africa, the Humanity Fund's mission has expanded to other areas. First, the Fund assists building long-term labor-community development projects with Southern activists. These projects reflect local needs of trade unionists, ranging from building physical infrastructure, providing credit for agricultural development, and helping HIV/AIDS education among trade union members. Second, the Fund promotes education of union members about corporate globalization in both Canada and the Global South. These education projects develop worker-based alternatives to corporate

globalization focusing on how privatization, capital mobility, and multinational corporations have affected local communities. Third, the Fund spends much of its resources facilitating worker-to-worker exchanges with Southern unionists as a way to put a face on workers thousands of miles apart but linked through processes of corporate globalization. These exchanges have been the foundation for building global networks like the one at Gerdau. Finally, the Humanity Fund lobbies opposition to free trade policy initiatives such as NAFTA and the Free Trade Area of the Americas (FTAA). This lobbying also includes organizing local worker mobilization at demonstrations in Canada through gatherings such as the People's Summit of the Americas in 2001 (Steelworker Humanity Fund, 2004; Marshall and Garcia-Orgales 2006). The Fund is bargained into individual union contracts and funded by member contributions of a penny per hour worked.

### *Global Union Federations (GUFs) and Global Networks*

Global Union Federations are “organizations bringing together national trade unions on an international level” (ICFTU 2004). GUFs work to build solidarity among member unions worldwide through financial assistance, and coordination of action against corporations or governments. They also do research and facilitate information sharing among members, engage in public awareness campaigns and work with NGOs such as the International Labor Organization (ILO) to develop worker-based trade and labor standards and lobby national governments (ICFTU 2004). In recent years GUFs have taken the lead in promoting IFAs between member unions and multinational employers. IFAs “aim to establish certain rules that regulate the corporation’s labor practices at the global level...” (Stavis and Boswell 2007: 175). While the USW has supported IFAs in principle, it has not been signatory to any IFAs (2007:187).

The USW belongs to four GUFs, the International Union of Food Workers (IUF), the International Federation of Chemical, Energy and Mine Workers (ICEM), the International Metalworkers Federation (IMF) and the International Federation of Building and Wood Workers (IFBWW). Through these GUFs the USW is able to maintain relationships with other unions in similar industries, discuss issues of globalization and develop solidarity strategies. Within these GUFs the USW has participated in both industry councils such as the Aluminum and Steel councils in the IMF and the Latin American United Tire and Rubber Workers Council (FUTINAL) in the ICEM, providing the USW with more specific industry-wide research, trends and projections (Steelabor 2001; Steelabor 2003).

More recently the USW (and PACE before it) has helped establish company networks at MNCs such as Bridgestone/Firestone (1996), Goodyear (1999), Smurfit-Stone (2000), International Paper (2002), Exxon Mobil (2004), and Kimberly-Clark (2007). These networks include unions from across the world representing workers at a common employer. They facilitate information exchange about company strategies in different countries and build a strategic understanding of how company may be using geographic disparities in treatment to undercut workers in other parts of the world. Company networks bring unions together to build common agendas around issues such as health and safety, outsourcing and other ILO core labor standards. These networks have been integral in USW comprehensive campaigns at Bridgestone/Firestone, Continental Tire and Gerdau as a means to coordinate escalating global pressure strategies in multiple places. Events such as international solidarity days (buttons or stickers), coordinated rallies, and solidarity strikes have all been coordinated through these company-wide networks.

## *Strategic Alliances*

Strategic alliances have been used as a way of deepening relationships between individual unions since the mid 1990s. The OCAW began exploring a long-term relationship with the Dutch union FNV Bodgenoten after management at a DSM Polymer facility in Virginia started an anti-union campaign during a 1996 organizing drive (OCAW Reporter 1998). DSM, a large Dutch chemical company, refused to recognize the union's NLRB victory. The OCAW reached out to the FNV for support in the Netherlands. FNV leaders came to Virginia, met with workers on housecalls and tried to meet with American management. After returning to the Netherlands, the FNV was able to help broker a deal to end the impasse and certify the OCAW in Virginia. Worker exchanges continued with the Dutch even after the Virginia campaign ended (PaceSetter, 1999; 2002). Similar worker to worker exchanges took place with the Finnish paper worker union (PaceSetter 2001) and with Brazilian unions at International Paper and BASF (Pacesetter 2001).

The USW has built strategic alliances with six major unions: IG Metall (Germany), CNM/CUT (Brazil), SNTMM-SRM, or Los Mineros (Mexico), Australian Workers Union, AWU and the Construction, Forestry, Mining and Energy Union (Australia) and signed a merger agreement in 2008 with the UK/Irish Unite the Union to form the first transatlantic labor union. These alliances are the building blocks for long-term partnership with unions who share common values, tactics. They are usually located in countries or regions strategic to production and extractive industries. "The ideal partners have industrial sectors similar to those where our members work. The USW additionally sought allies showing militancy, sophistication in research and bargaining and an understanding of the global economy with no direct ties to their governments." (USW@Work 2006a: 24-25).

## *Steel Tariffs*

In March of 2002, U.S. President George W. Bush announced the implementation of tariffs of up to 30 percent on foreign finished steel. This protectionist measure was adopted after strong lobbying from the USW and other U.S. industrial unions in response to heavy job losses in the steel industry and steel dumping from developing nations such as China, India and Brazil. The effect of this protectionist measure was initially cause for some concern among international union allies but after discussions among union leaders, a common policy on tariffs was agreed upon (Grana and Navarro 2002). Rather than adopt a more free market approach to the tariff issue, the CNM/CUT and USW were able to agree that existing free market approaches to lower tariffs had actually hurt both Brazilian and US workers.

After privatizations, technological improvements and corporate restructuring in the mid-1990s Brazil had become the fifth largest exporter of steel (Grana and Navarro 2002). But at the same time Brazil had become a major exporter of steel, Brazilian steelworkers felt the effects of this turn towards an export-oriented growth strategy. The competitiveness of Brazilian steel on the world market was directly linked to increased productivity, a “crushing of wages” and a 23% reduction in overall levels of employment (Grana and Navarro 2002, paragraph seven). Export-oriented growth had also come at the expense of domestic infrastructure and Brazilian standards of living (Steelabor 2002a).

The CNM/CUT met with the AFL-CIO in Brazil in March 2002 and with USW leadership in April 2002 (also in Brazil) (Grana and Navarro 2002). The CNM/CUT also met with Brazilian politicians to push for higher domestic tariffs to match the ones adopted by the US and European Union. In June, the CNM/CUT and USW began a series of worker exchanges to deepen mutual understanding of the

situations faced by union members in each country (Steelabor 2002a). Due to a history of trust and solidarity work, USW and CNM/CUT leaders were able to take a potentially divisive issue such as tariffs and transform it into a platform for cooperation and deeper hemispheric involvement.

### *Brazilian Labor Internationalisms*

Internationalism in the Brazilian labor movement emerged from the “Novo Sindicalismo,” or “New Unionism” movement in the late 1970s and 1980s. This movement was centered in the auto sector in the industrial region surrounding São Paulo known as the ABC.<sup>1</sup> New Unionism in the late 1970s and 1980s was rooted in rank and file mobilization, autonomy from State control over union affairs and direct negotiations with employers. Unions used in-plant factory committees, mass strikes and links with community and social movements to build a broad, class-based movement of industrial workers. These early roots in rank and file mobilization, direct negotiations and oppositionist ideology would influence more recent international strategies.

This movement was shaped by the uniquely Brazilian code of labor laws, a repressive military dictatorship and a global reorganization of industrial production turning regions like the ABC to the battlegrounds of a new form of industrial unionism. The CNM/CUT’s international strategies would be formed both by the legal restrictions on its development as well as openings in its economic and social environment.

Brazilian labor unions were saddled by a system of corporatist labor laws rooted in the 1930s populism of Getulio Vargas. Vargas had based Brazilian labor law system (the Consolidation of Labor Laws, CLT) on Mussolini’s mix of corporatism

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<sup>1</sup> ABC is an acronym for the towns of Santo André, São Bernardo and São Caetano.



and fascism. “Creation of trade unions became dependent on the State’s permit. The latter began to sponsor, support and control unions, and thereby the whole system of labour relations. Little ground was left for the parties’ autonomy and direct relationships between employers and workers” (Rands Barros 1999: 17). The *impôsto sindical*, or state-imposed union tax, meant labor unions were dependent upon State funds for their internal operations. Unions did not have the right to in-plant representation; negotiations were held at the industry level giving rank and file workers very little say in their union’s day to day affairs. Under state corporatism, unions were forced to act more as social welfare organizations than democratic member-based organizations.

Economic shifts were also shaping the way in which labor unions and social movements would emerge. The Brazilian state adopted a policy of Import Substitution Industrialization (ISI) in order to stimulate growth in industrial sectors such as auto and capital goods. Fuel, steel and raw materials would be nationalized in order to ensure a stable supply of inputs for the growing industrial sectors in auto, chemicals and capital goods. In 1978, automobiles and auto parts made up more than half of Brazil’s exports (Seidman 1994: 48). This meant that these industries were vulnerable to work stoppages, giving these workers more leverage to influence State policies.

These industrial sectors such as auto and chemicals that were the heart of Brazil’s growth strategies were also industries which were globally connected to both US and Western European markets as well as other emerging industrial nations, such as South Africa. Anner (2004) notes that “[N]ot all production regimes are alike. How production and distribution are structured in a sector affects labor and labor strategies” (2004:15). Unlike buyer-driver commodity chains (such as textiles and apparel), producer-driven commodity chains (such as auto, chemicals and steel) are more likely to produce transnational labor networks. Transnational labor networks with labor

movements in both the Global North (especially Germany, Canada and to a lesser extent the US) as well as the Global South (South Africa, Mexico and Korea) would play important roles in shaping Brazilian internationalist trade union strategies.

ISI policies also meant the State would be in charge of planning, implementing and enforcing labor peace between industry and workers. Industrial growth needed labor peace and state corporatism was the tool used to keep both industrialists and workers in line for the greater good of national growth. From 1964 to 1989 Brazil was under the rule of a military dictatorship which restricted independent trade unionism and worker militancy, though the trade union movement would be at the forefront of challenging the dictatorship's rule. In the early years of the dictatorship, labor leaders were arrested, tortured and killed. Communist and independent trade union movements were repressed or co-opted by the State (Klein 2007).

### *CUT Internationalisms*

The Central Única dos Trabalhadores (CUT) was founded in 1983 as the major opposition labor union to the state-sponsored Central Geral dos Trabalhadores (CGT). The CUT grew out of the need for an organizational vehicle to harness the growing militancy in the industrial workforce. The CUT “[E]mphasized mobilization and confrontation. It opposed the existing model of labour relations, stressed the autonomy of the working class, and, although participating in the general struggles of democratic forces against the regime, tended to underline the specific workers’ claims within the democratic programme” (Rands Barros 1999: 32-33). Many of the founders of the CUT had been active in the foundation of the *Partido dos Trabalhadores* (PT), or Workers Party, in 1980. Current Brazilian President Lula da Silva was the leader of the Sao Bernardo Metalworkers Union and a founder of the PT as well.

### *Early Worker Exchanges*

Early international links were made through the World Company Councils in the late 1970s as well as through independent solidarity initiatives. At Volkswagen, Ford and Mercedes-Benz, relationships with the German metalworkers union IG Metall were especially important. The German system of works councils and in-plant representation were models for the incipient in-plant factory commissions the CUT had been organizing in the auto plants of the ABC (Anner 2004: 183). Exchanges gave Brazilian trade unionists an opportunity to exchange models of in-plant representation. Through the Volkswagen World Council, German unionists gathered funds to support South African and Brazilians. In the 1980s shop stewards at the VW Wolfsburg plant set up the “Working Group for International Solidarity” and organized seminars and exchanges for Brazilians to come to Germany (Rüb 2002:21). These same German unionists would assist Brazilians when they came to Wolfsburg to negotiate directly with VW management to protest layoffs (Anner 2004: 193).

Attempts to engage in international strategies with the UAW were less fruitful. The UAW has participated in international level meetings at the IMF, though it is wont to engage in direct union-to-union strategies, preferring to pursue national collective bargaining strategies. This reluctance has been a persistent barrier to building stronger transnational networks in the auto industry. It is difficult to engage in comprehensive strategies without cooperation from unions in the home country of the largest auto manufacturers.

Transnational work with the CAW has been more successful, owing to the CAW’s origins rooted in opposition to the UAW’s concessionary bargaining strategies in the 1980s. In 1997 the CAW and CNM/CUT began exchanges for women trade union activists to develop leadership skills and address issues of gender discrimination (MetalWorld 2008). While the CAW has devoted staff members to developing

international ties with other unionists through their CAW Social Justice Fund (MetalWorld 2008) it has been less eager to engage in cross-border campaign tactics. At the 2007 “Building Bridges” conference in Windsor, Ontario, the director of the CAW’s International Department, Carol Phillips, struck a more protectionist tone noting “We need to be completely engaged in the home front, we need to be completely engaged domestically, before we can add an international component to our struggle” (Phillips 2007).

Early exchanges such as the ones with German trade unionists in the auto industry, while not being utilized as strategies for campaigns or during collective bargaining, were crucial to the later campaign work in the 1990s and 2000s. These face-to-face meetings built a sustained relationship of rank-and-file organization through trust building and added international solidarity into the pool of strategies that unions could use in future work. Because workers had met other workers and built personal relationships, international solidarity was now an option for future campaigns.

Though these international exchanges were setting the ground for future collaboration, Brazilian union strategies focused on domestic solutions to collective bargaining problems. “Unionists received international support to form these factory commissions. But the core component of the Brazilian unionists’ strategy in the 1980s was still national or sub-national. The strike was the action of choice, and the 1980s was one of the periods of the greatest strike activity in Brazilian history” (Anner 2004: 181). CUT unions focused on member mobilization, and mass strikes to influence industrial policy and make economic and political gains for the labor movement as a whole.

The political economy of Brazil shifted from ISI growth policies to a neoliberal approach under President Fernando Henrique Cardoso in the mid 1990s.

Cardoso (and to an extent his predecessor, Fernando Collor) privatized state enterprises, invited foreign investment and worked with the International Monetary Fund to stabilize the ailing Brazilian economy. A more hostile economic and political climate of free market reforms meant relying solely on the traditional strategies of mass strikes and direct mobilization would be less effective.

A new labor union central, Força Sindical dedicated to a “unionism of results” had been formed in 1991 (Rands Barros 1999: 38). Força Sindical was more willing to cooperate with the government, supported the privatization of state industries and promoted free market reforms as the way to modernize Brazil’s economy. Força became the CUT’s major rival for members and offered a very different model of unionism from the CUT’s member-mobilization focus (Anner 2004).

It wasn’t until the 1990s that the CUT changed strategies and began exploring international campaigns as tactics. Industrial restructuring in the auto industry towards lean production and non-union sites shifted the industry from the heavily unionized South and Southeast to the less unionized and poorer Northeast. These shifts were used as strategies to whipsaw CUT unions in the South to accept layoffs and concessions. Força Sindical’s model of cooperation was a growing force. It used agreements with local and regional politicians to gain representation rights to new industrial sites in the North. “The oppositional unionists found that contentious activities had to be combined with transnational information exchange, campaigns and international collective bargaining to be effective” (Anner 2004:183). Faced with industrial restructuring, union competition from Força Sindical and neoliberal economic policies, the CUT would have to expand its repertoires of action. The relationships forged in the worker exchanges of the 1980s would have to be transformed from networks for information exchange into tangible campaign strategies.

## *Campaign Strategies*

The CUT has used transnational labor strategies in dealing with multinational employers, especially in the auto industry where they have incorporated transnational strategies into their collective bargaining campaigns and protests against layoffs. Building off the foundation of worker and information exchanges with Canadian and German trade unionists (though not the UAW), the CUT has used direct negotiations with auto companies. In 1999 Ford announced 2,800 workers at their São Bernardo plant were to be laid off just before Christmas. Bargaining with the Brazilian state was unsuccessful and leaders decided to go to Detroit to meet Ford executives. CUT negotiators were able to secure a five year guarantee for future work. Likewise after layoffs were announced at VW in 2001, CUT leaders traveled directly to Wolfsburg to meet VW executives. Anner (2004) notes that transnational labor networks only developed at VW where the CUT and IG Metall had been in contact for almost twenty years. The UAW's reluctance to engage in transnational coalition building has impeded the ability to build stronger transnational networks.

At Daimler Chrysler CUT unionists were able to use historical ties with German and South African unionists to build a dynamic series of sympathy strikes and work stoppages. In 2000, Brazilian workers had gone on strike to protest layoffs of temporary workers. Management attempted to shift production to Germany by adding an extra Saturday shift. After finding out about the Brazilian strike and management's attempts to shift production through the international works council, Germans refused to take the shift in order to aid the Brazilians on strike. Likewise in 2001, workers in Germany and Brazil were able to coordinate strategies refusing to take extra work to compensate for a strike at South African plants (Anner 2004).

## *Information and Research Strategies*

The CUT has used research as a tool for building transnational strategies. Because Brazil is host to dozens of multinational corporations, a large proportion of the CUT's membership is employed at these MNCs. Consequently the CUT has had to develop in-depth, sophisticated research and monitoring approaches to foreign MNCs.

The Social Observatory Institute was founded in 1997 by the CUT to research and monitor foreign MNCs operating in Brazil. The Social Observatory monitors MNCs to measure their compliance with ILO core labor standards using research resources as well as interviews with rank and file workers. The Social Observatory then issues reports on the behavior of these MNCs for both public pressure in conjunction with collective bargaining campaigns. The Social Observatory's research methodology incorporates a broad range of issues such as gender equity, discrimination, and child labor beyond the traditional issues of wages and benefits. Unions are then able to incorporate these issues into their bargaining campaigns to build stronger unions, better working conditions and a more progressive union culture (Barbosa et al. 2006).

Out of the Social Observatory came the "Action Front for Multinationals," or "CUTMulti." Established in 2001 in cooperation with the Dutch union federation FNV, the CUTMulti goes beyond research and initiates relationships with foreign trade unions operating at the same MNC in order to build company-wide transnational labor networks. The CUTMulti has helped build regional and global networks at MNCs such as BASF, Carrefour, Arcelor Mittal, DuPont and Dow among others. The CUT has used these networks for global campaigns as well as for coordinated national bargaining strategies to combat regional disparities in wages and working conditions (CUTMulti 2008).

### **III. Company and Industry History**

#### *Grupo Gerdau*

Joao Gerdau, a German immigrant, and his son Hugo Gerdau, founded Gerdau Group Pontas de Paris Nail Factory in 1901 in Porto Alegre. The Gerdau family became local industrialists in the booming Southeastern region of Brazil. In 1948 the company entered the steelmaking business focusing on scrap steel and feeding the growing heavy industries of the Southeast. Through the 1950s and 1960s Grupo Gerdau expanded as a regional industrial force in the states of Sao Paulo and Rio de Janeiro and began domestic expansion into the Northeast in 1969 with operations in the state of Pernambuco. Gerdau opened its first retail outlet for selling commercial steel in 1971 in Sao Paulo.

By the 1980s Gerdau had begun expanding international operations after acquisition of the Uruguayan Laisa Steel (1980). Gerdau made its first North American acquisitions, buying Canadian steel companies Courtice Steel (1989) in Cambridge, Ontario and MRM Steel (1989) in Selkirk, Manitoba. Grupo Gerdau continued its domestic expansion through aggressive acquisition of recently privatized steel mills.

Expansion continued through the 1990s with acquisitions of AZA Steel in Chile (1992) and Sipar Aceros Steel in Argentina (1998). In 1999 Gerdau became the majority stakeholder in US based Ameristeel. By 2002 it owned eleven mills in North America and changed its name to Gerdau Ameristeel for North American operations. Colombian companies Diaco and Sidelpa became part of Gerdau in 2004 followed by Siderperu in 2006. Gerdau continued its North American expansion with the acquisition of CoSteel in 2002, North Star Steel in 2004 and Sheffield Steel in 2006. Gerdau made its first move beyond the Americas when it bought the Spanish company Sidenor in 2006 (Gerdau 2006).



### *Gerdau Ameristeel*

Ameristeel began as Florida Steel Products in Tampa, Florida in 1937. Florida Steel produced rebar and grew into producing rail products, nails and wire. In the 1980s it expanded beyond Florida into Southern regional markets in South Carolina and Louisiana. In 1996 Florida Steel became Ameristeel and in 1999 was bought by Brazilian steel firm Gerdau. In 2002 Gerdau consolidated its North American steel operations to create Gerdau Ameristeel, headquartered in Tampa. 2004's acquisition of four minimill facilities from Cargill's North Star operation expanded Gerdau Ameristeel into Midwestern regional markets. By 2006 Gerdau was the second largest minimill operator in North America (behind Nucor). After the acquisition of Chaparral Steel in 2007 Gerdau became the fourth largest overall steel producer in North America (Gerdau Ameristeel 2007).

### *The Minimill Industry*

Since the late 1970s the steel industry has undergone intensive restructuring. Declines in heavy industries such as automobiles, containers, railroads and machinery, the increase in direct foreign imports and technological advances have all put pressure on the integrated steel industry (Hogan 1987). Minimills, which are smaller, less expensive to run and more technologically integrated, began to compete with the larger, more capital-intensive integrated firms such as USX, LTV and Bethlehem Steel in the late 1970s, placing pressure on traditional USW strongholds (Hogan 1987).

The steel industry is divided into three sectors: integrated, specialty and minimill. Integrated steel is the largest sector, accounting for around 75 percent of US production. Iron ore, limestone, and coal are placed in large blast furnaces to produce steel. Companies such as Arcelor Mittal, US Steel and Severstal are leaders in

integrated steel. Specialty steel is a high skill process for making stainless and alloy products for specialized consumers. Minimills, however,

...are fundamentally different than other parts of the steel industry in they use scrap steel as their primary input and melt it down in electric furnaces, eliminating the need to prepare iron ore and coke like traditional mills. This molten steel... is usually made into billets, which are later rolled into either reinforcing or hot rolled bars, wire rods, or structural shapes. Minimills typically concentrate on the low cost, low quality end of steel production due to their technological limitations. Whereas integrated mills have focused on national and international markets, minimills are regional in nature. Scrap steel is purchased from local sources and the primary customers are usually located a short distance from the plant. (Seroka 2005: 42-43)

Arthur (1987) identifies four types of industrial relations strategies in the minimill industry. In union facilities Arthur identifies a “traditional union strategy” of adversarial union-management relations, though he claims these have been concentrated in older minimills, many of which have now been shut down or sold to larger firms such as Birmingham Steel (now part of Nucor) (Arthur 1987). The second type of industrial relations strategy in union minimills has calls “cooperative union strategy.” This strategy is marked steady pay and benefit increases and contracts in line with traditional integrated mills though with some work rule trade-offs (Arthur 1987).

Arthur identifies two non-union labor relations strategies, “company identification” and “traditional nonunion.” The company identification model is based on the satisfying employee needs for job security and pay, merging company and employee goals through profit sharing and flat organizational structures. Industry leader Nucor is the most prominent proponent of this model (Arthur 1987: 119-120). According to Arthur, traditional nonunion strategies include an authoritarian, aggressive anti-union stance. Union drives are countered with legal and sometimes illegal opposition tactics such as firings, intimidation and confrontation. Companies

such as Bayou Steel and Birmingham Steel represented this model of industrial relations. Arthur's theory failed to take stock of the size and distribution of these practices on the overall minimill industry, underestimating the level of employer opposition endemic to the minimill industry.

It is important to note that the industrial relations strategy at Gerdau Ameristeel most closely resembles that of the "traditional nonunion" strategy followed by Birmingham Steel and Florida Steel, the two precursors to the current Gerdau Ameristeel. Florida Steel was one of the most well-known of the anti-union minimill firms throughout the 1970s and 1980s. A 1980 Federal 5<sup>th</sup> Circuit Court decision noted:

By one count, Florida Steel had been found guilty of an unfair labor practice by the Board on seventeen separate occasions since 1974, with enforcement ordered by the court in ten of the twelve cases reviewed on appeal. The company has countered by emphasizing the disputatious character of the Steelworkers organizational and representational activities at various plants, leading to the filing of dozens of charges and to the characterization by this court of the controversy as one reminiscent of the feud between the Hatfields and McCoys. (Federal Circuits, 5<sup>th</sup> Circuit. June 25, 1980)

USW organizing attempts at Florida Steel in the 1970s and 1980s were vicious, highly adversarial affairs. During the USW's drive to organize Florida Steel's Indiantown, Florida minimill facility the company "withheld certain pay and benefit increases to union employees which the board found to be in violation of the National Labor Relations Act" (Arthur 1987: 122). Between 1973 and 1979, Florida Steel was ordered to pay \$3.3 million in back pay to employees in the third largest settlement handled by the NLRB (Arthur 1987). This culture of highly adversarial anti-union labor relations by Florida Steel management would continue as Florida Steel became Ameristeel and then Gerdau Ameristeel.

The USW has noted the threat of minimills to the traditional union stronghold in integrated mills but has been largely unsuccessful in organizing the minimill industry overall (Kuster 1995). As of 1995 the USW represented just over half of all North American minimill employees, though it has been unable to gain a foothold in the industry at leaders such as Nucor (Kuster 1995). The USW noted “[N]ew minimill projects represent a total investment of about \$4.5 billion, of which about \$1 billion will come from tax breaks and subsidies by local and state governments” (Steelabor 1995: 10). The USW outlined a two-pronged approach: first, to slow future minimill growth through political lobbying of local governments in order to end tax breaks for minimill companies and second to organize existing minimill sites (Steelabor 1995). There is little or no current research on the level of unionization within the minimill industry to track gains or losses in the minimill industry. The USW’s lack of a coordinated strategy for new organizing in the minimill industry is likely to be a problem for unionized workers in the minimill industry. Without expanding levels of density in an already anti-union industry (Arthur 1987; D’Costa 1999), bargaining power is more likely to erode for workers such as those at Gerdau.

#### **IV. Building a Global Union at Gerdau (1997-2007)**

##### *Comissão dos Trabalhadores do Grupo Gerdau*

National coordination of Gerdau workers in Brazil began years before the cross-border network developed. The CUT undertook a program to build nationwide union networks at large national and multinational firms (Jakobsen 2003). Gerdau was an exception among other multinationals targeted for network building because it was a Brazilian multinational operating in other countries rather than a Western multinational operating in Brazil. CNM/CUT representative and Gerdau worker Fernando Lopes would direct the organization of the Gerdau network.

The first meeting of Brazilian Gerdau workers took place in 1989 in Rio de Janeiro. This meeting had two important goals. The first goal was to understand Gerdau's corporate structure, its growth plan and negotiating strategies. It was important to strategically map the company's operations and growth plan, especially since it had taken advantage of recent privatizations in order to expand beyond its base in the South and Southeast. They would also need to gather information about wages, benefits and the content of collective agreements from the union locals since there was no preexisting research database on Gerdau. Because unions had no access to company information, nor any right to internal financial records, the unions would have to gather the information themselves.

The second goal would be to create a more sustained structure for all Gerdau unions to interact and communicate. Ultimately this organization, called the Comissão dos Trabalhadores do Grupo Gerdau, would attempt to build a unified national agenda for collective action and national bargaining directly with Gerdau (as opposed to the municipal-level bargaining mandated by law). The Comissão would be composed of Gerdau unions in both the CNM/CUT and Força Sindical, and would publish and circulate newsletters, organize regional and national meetings with all Gerdau unions and reach out to Gerdau management to begin the process of collective negotiations for all Gerdau workers. The Comissão pledged to research and contact unions in Uruguay, Chile and Canada to begin a dialogue and information exchange (Boletim Unificado, 1995).

The organizational difficulties of bringing together workers from across Brazil and from rival union confederations were formidable and the resolutions of the first meeting were left largely unfinished. By 1995, when the second meeting of Brazilian Gerdau workers took place in Porto Alegre (Rio Grande do Sul), Gerdau had expanded through the acquisition of recently privatized steel mills. Gerdau's corporate

expansion had extended the reach of the Brazil network, but brought new challenges to the network in the form of uneven levels of union representation and regional wage disparities. Previously State-run mills generally had stronger union presence and higher wages, while mills originally owned by Gerdau tended to have a weaker union presence and a more patriarchal role for Gerdau management. For example, employees at the São Leopoldo plant in Rio Grande do Sul averaged \$220 reais/month, while those in the former state-run Rio de Janeiro facility averaged \$450 reais/month (Boletim Unificado, 1995). Union representatives shared information on wages, working conditions and content of respective collective agreements as well as various organizing and negotiating strategies each local had used with Gerdau.

The structure of Brazilian union representation also brought unique challenges for building a national network at Gerdau. Because unions are limited to representation at the regional and sectoral levels, Gerdau management was not bound to recognize any workers organization (such as the Brazilian Gerdau network or the national confederations) beyond the legally mandated regional bargaining. As João Lima, Gerdau employee relations representative stated:

While trying to continue investing in the evolution of the democratization of relations (with Gerdau)...depends in large part on the attitude of workers organizations... in the case of a 'strong' union action, the reaction from the company will be "strong" and the option, once again, will be to create channels directly with employees. (Boletim Unificado 1995)

There were no legal structures, such as co-determination rights, to support a national network. This meant that unions at Gerdau would have to build sufficient strength at the national level, through plant-by plant organizing in order to induce Gerdau into recognizing their demands. The burden would be on the unions themselves to organize a national (and ultimately international) network, without the help of labor law or a tradition of social dialogue. The ultimate goal would be to build

a unified national platform from which to negotiate directly with Gerdau for all workers across Brazil, but this goal would be hampered by the constraints of Brazilian labor law, employer intransigence, and uneven union coverage.

Though the goal of national collective bargaining would not be easily reached, the first meetings of Brazilian Gerdau workers ultimately would be crucial to the long-term development of an international network. An infrastructure of information sharing, communication through newspapers and meetings, as well as an institutional commitment from the CNM/CUT and Força Sindical to long-term organization at Gerdau would be instrumental once network building took an international turn. The Brazilian network created a parallel structure for worker-to-worker communication on a national level, a structure the Brazilian industrial relations system did not provide for.

“Bridgebuilders” were crucial to the long-term continuity of both the Brazil network and the cross-border network. Fernando Lopes, a Gerdau employee and later CNM/CUT representative, was one of the early (and most energetic) organizers of the Brazil network and would become a key bridgebuilder between the established Brazilian Comissão and the nascent cross-border network. At founding of the Comissão, Lopes was an engineer at the Gerdau Bahia USIBAS plant (recently privatized and bought by Gerdau in 1989) and had been active on the Brazilian Left during the military dictatorship. Judith Marshall of the Steelworker Humanity Fund (SHF) had lived and worked in Mozambique teaching and researching popular education methods throughout the 1980s. Under Marshall, the SHF had become increasingly involved in issues such as development, regional free trade agreements and the effects of multinational corporate expansion. Carolyn Kazdin of the AFL-CIO’s Solidarity Center had lived and worked in Brazil during the 1970s as a Peace Corps volunteer. The Solidarity Center would provide an important link to the USW

once Gerdau expanded into the United States. Both Marshall and Kazdin spoke fluent Portuguese and had extensive contacts with Brazilian unions and social movements.

*1<sup>st</sup> Inter-American Meeting of Workers of the Gerdau Group (1998)*

The origins of a cross-border Gerdau network arose from exchanges between the Steelworker Humanity Fund (SHF) and the CNM/CUT from January 16-31, 1997. A CNM/CUT delegation traveled to Canada, attending the Iron and Steel Conference in Hamilton, Ontario, touring a worker-owned cooperative in Sault Sainte Marie, and participating in a day-long workshop on NAFTA/MERCOSUR in Toronto with the Canadian Steelworkers, the SHF and Common Frontiers. “[T]he CNM was lobbying Canadian labour and social movements to work with them in crafting joint positions derived from...respective experiences in NAFTA and MERCOSUR for the new phase...crafting of the FTAA” (Brazil-Canada Metalworkers Exchange 1997:1).

The issue of Gerdau, which had acquired Canadian facilities at Courtice Steel in 1989 and MRM Steel in 1995 and was rapidly expanding in Brazil after a wave of privatizations in the Brazilian steel sector, was raised during a two-hour meeting on January 29, 1997 (Brazil-Canada Metalworkers Exchange, 1997). Local union representatives at Courtice and MRM were curious to know more about Gerdau since it was a relative newcomer to the Canadian scene. CNM officials agreed to send copies of Brazilian collective bargaining agreements and newsletters from the Brazilian Gerdau network to the Canadians. The CNM also offered to send a representative to upcoming rounds of bargaining for the Canadian locals. The SHF, having already been involved in creating cross-border links with Chilean mineworkers unions and having an existing relationship with the CNM in Brazil, decided to take the initiative to expand the network at Gerdau through another meeting in Brazil the following year (Brazil-Canada Metalworkers Exchange 1997: 2).



The First Inter-American Meeting of Workers of the Gerdau Group took place April 20-23, 1998 when Brazilian, Chilean and Canadian workers met in Charqueadas (Rio Grande do Sul state), Brazil. Workers compared information about wages and relative purchasing power. Comparing workers' wages between developed and developing countries showed obvious discrepancies, but a comparison of the relative purchasing power of those wages in respective countries made the impact of these discrepancies clearer. The average wage of a Canadian Gerdau worker was \$24,166 while a Brazilian Gerdau worker's was \$4,743 and a Chilean's \$4,160<sup>2</sup> (First Inter-American Meeting of Workers in the Gerdau Group 1999). But the disparity in relative purchasing power of these wages was even starker when comparing the number of salaries needed to purchase a car. In Canada it took two salaries, in Chile over thirteen and in Brazil up to twenty-eight average salaries to buy a car. While this research highlighted disparities between countries, it also showed regional variation within Brazil. Workers in Divinopolis and Contagem plants in Minas Gerais averaged \$416.66/month while workers in the Sao Jose dos Campos plant outside São Paulo averaged \$566.66/month (First Inter-American Meeting of Workers in the Gerdau Group 1999). Comparisons such as this helped bring together workers in the already existing Brazilian Gerdau network as well as the nascent cross-border network.

Differences and similarities in working conditions and union structure were another topic of exchange between Gerdau workers. Union structure in Brazil is unique in that it only allows for representation at the municipal and sectoral level. Unions such as the CNM/CUT have created parallel structures for local representation (factory commissions and company networks) since neither in-plant nor national representation is legally required. While the CUT has been resolute in its commitment to building both kinds of structures, both in-plant and national representation

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<sup>2</sup> All figures in 1997 \$USD.

structures have been met with legal and corporate resistance and consequently levels of union strength vary from region to region. Because workers in Brazil lacked the right to in-plant representation and faced challenges such as variable and arbitrary work shifts where the company has unilateral decision-making power over the length of shifts and which days employees must work, the priorities of the Brazilian contingent were different than those of the Canadian and Chilean workers, tending to emphasize a minimum set of rights and standards for the company to adhere to. Other issues such as subcontracting and the implementation of Total Quality Management and work teams were common trends across all three countries (First Inter-American Meeting of Workers in the Gerdau Group 1999).

In the wake of the passage of NAFTA in 1995 and ongoing negotiations over the hemisphere-wide FTAA, great efforts were taken to go beyond basic worker to worker exchanges that focused solely on the bread and butter issues of wages and working conditions, and link the issues of free trade and corporate power. “The CNM/CUT is seeing Gerdau as having a hemispheric strategy, with its operations in the four countries, and placing the emphasis on Gerdau as part of understanding some of the new dynamics of corporate rule in the hemisphere.” (Marshall 1997:1). As companies like Gerdau were rapidly expanding beyond national boundaries, workers would need to know more than just the basics of respective working conditions, but would need to understand the broader shifts in the political and economic landscape. NAFTA and the proposed FTAA were making it easier for capital to move across national borders, facilitating restructuring within corporations and across whole industrial sectors such as auto and steel, and unions could rely less upon traditional allies such as the State to protect them from corporate whipsawing. Cross-border networks like that at Gerdau would need to integrate an educational component to

understand how macro processes, like free trade agreements and resulting corporate expansion, were affecting workers' ability to fight back.

These exchanges and educational sessions were a necessary first step for building more permanent links between Gerdau workers, but the first meeting was not without its challenges. The SHF had anticipated difficulties in “coordinating joint strategies among four countries (sic)<sup>3</sup> where bargaining is carried out in very different ways.” (SHF memo, undated: 2) and “continuity of initiatives from the base, rather than promoted by SHF or CNM International Relations” (SHF memo undated: 2). The financial costs of organizing a week-long international meeting were also an impediment to sustained contact. Travel arrangements, logistics and time off for the Canadian and Chilean workers were shouldered by the USW. Because each of the three industrial relations systems were substantially different than each other, workers in each country brought a different set of priorities to the network. These differences would not be worked out in one meeting, but would need to be negotiated through a long-term relationship of trust-building and collective action.

Because this was the first international meeting of its kind for Gerdau workers it would need to be carried back to the shop floor in order to build truly cross-border linkages. Workers who participated also had to return to their shops and convince their local members that they had taken part in an important event that ultimately affected them on the shop floor, not just traveling on a union junket. Ultimately this would be the long-term test of the Gerdau network: the ability of participants in these international exchanges to communicate the importance of what happened far away (usually in a tropical-sounding location) to workers on the shop floor who had never been involved in cross-border activities. If workers on the shop floor did not feel as if these exchanges had any connection or relevance to their quotidian life at Gerdau or if

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<sup>3</sup> Uruguayan workers were invited but chose not to participate

participants could not effectively bring the lessons of these exchanges back with them, then the network would falter.

The SHF's focus on the pedagogical component of these exchanges included a broader understanding of the changing political and economic landscape in which unions and corporations were now operating would be central to building more sustained cross-border links. Regional integration, free trade agreements and broader shifts in political economy would need to be integrated into worker exchanges. This would provide a context for dialogue and trust building between workers over the long run.

### *2nd Inter-American Meeting of Workers of the Gerdau Group (2003)*

By 2003 the need for a second international meeting of Gerdau workers became apparent. First, it had been nearly five years since the meeting in Charqueadas. Both Gerdau and union representation at Gerdau had changed. Gerdau had grown in Brazil from twelve to twenty three mills. It was now the fourteenth largest steel producer in the world, the largest producer (in terms of raw steel) and the second largest (in profits) in Brazil (Gerdau Final 2003). Internationally, Gerdau had also grown. It had expanded into Argentina through a joint venture with Sipar. In North America, it had made its largest acquisition when it bought seven mills from AmeriSteel in 1999. In 2002 it acquired a third Canadian mill outside of Oshawa from Co-Steel. In October 2002, Gerdau's North American operations were consolidated and renamed Gerdau Ameristeel.

Gerdau's acquisition of Ameristeel proved to be a catalyst for further international coordination. Of the seven mills in the AmeriSteel acquisition, only one was unionized (the Perth Amboy facility). AmeriSteel and the USW had had a contentious relationship since the 1970s. Ameristeel management was virulently anti-

union and had fought a series of legal challenges to the USW's organizing drives at its North Carolina and Florida facilities (see above). The Canadian former Co-Steel mill was already represented by the USW.

The USW and CNM/CUT were also trying to build a common agenda more broadly in the global steel industry. In March 2002 President George W. Bush announced steel tariffs of up to 30 percent on all foreign steel. The USW had been lobbying for protection after years of heavy job losses. These protections angered steel producers in the Global South who saw entrance to US markets as a key area of growth. Unions such as the CNM/CUT also took offense at the USW's support for the tariffs, but instead of retreating to national chauvinisms, the two unions took the opportunity to develop a common agenda beneficial to both unions through worker to worker exchanges (Steelabor 2002a). Stronger international ties at emerging multinationals such as Gerdau were integral to this development of a labor-friendly development agenda.

From July 28-August 1, 2003 delegates from Brazil, Canada, the United States, Argentina, Chile and Uruguay met in Rio de Janeiro for the Second International Meeting of Workers of the Gerdau Group. Jorge Garcia of the USW Canadian Research Office and Ike Gittlin of the USW Organizing Department and representative from each of the Gerdau AmeriSteel Canadian facilities attended. Carolyn Kazdin represented the AFL-CIO's Solidarity Center. A representative of the Brazilian Labor Ministry addressed the group on the first day. The International Metalworkers Federation (IMF) sent two representatives, one European and one based in Chile (Gittlen 2003). Gerdau management had initially agreed to attend the meeting and offered a plant tour but pulled out at the last minute (Gittlen 2003).

The Brazilian research organization DIEESE presented overviews of Gerdau's history, its growing market share and growth plans as well as plant-by-plant statistics

on respective unionization rates in each country (especially important in Brazil, where membership is voluntary), average wages, weekly work week length and the major contract demands of each plant (DIEESE 2003).

The second meeting furthered the initial relationships built from the first Gerdau workers meeting in 1998. In the first meeting international strategies were still more a possibility than a reality. By 2003 it had become clear that Gerdau was prioritizing growth outside of Brazil, both in other regions of South America and in North America. Gerdau was quickly becoming a major player in the Hemisphere giving it more bargaining power over Gerdau workers. Unless workers could find some way of matching Gerdau's hemispheric reach, Gerdau workers everywhere would be at a serious disadvantage for future bargaining and organizing efforts. The acquisition of AmeriSteel was particularly problematic for South American unionists as it meant that there could now be an importation of the more aggressive, US-style anti-union measures.

In a memo, USW representative Ike Gittlin noted "personal relationships seem to be very important seem to be very important and trust is critical" (Gittlin 2003: 5) and earlier in the memo commented "It appears to me that the group is moving from initial stages of meet and discuss, to a more detailed set of goals and objectives" (Gittlin 2003: 5). The participation of IMF delegates was the first step in creating a formal working group of Gerdau workers recognized and endorsed by the IMF. Furthermore, participants agreed to "to explore the implementation of an International Master Agreement with the Gerdau Group, coordinated by the IMF." (Resolutions 2003).

### *Conclusions*

A national network of Brazilian Gerdau workers had existed since 1989 as a way of bringing members of the CNM/CUT into dialogue and coordinated action during the era of neoliberal restructuring under President Fernando Enrique Cardoso. Exchanges between Brazil and North America continued until 2002, ranging from two or three days to full ten day exchanges facilitated by the AFL-CIO Solidarity Center (Carolyn Kazdin, then head of the Solidarity Center, would later become the key “bridge builder” during the Beaumont campaign and afterwards). These initial exchanges, mainly between the USW in Canada (there was only one US Gerdau facility at the time) and the CNM/CUT, were informal in nature and consisted mainly of social events, meetings with local union membership and embryonic education about each country’s respective labor systems (this would be a key in securing the support of both leaderships and rank and file Gerdau workers in Brazil during the Beaumont lock out). But despite the seemingly casual structure of these international exchanges, they initiated a long process of building trust among workers who were not accustomed to internationalism as a tactic for building local union strength, much less used to soliciting international support during collective bargaining struggles.

### *North Star Bargaining/Unity Council*

National coordination of North American Gerdau workers had its roots in the North Star Unity Council. The Unity Council was established in 1999 in order to maintain communication between the four USW-represented North Star/Cargill facilities in Wilton, Iowa; St. Paul, Minnesota; Beaumont, Texas; and Calvert City, Texas. Until 2003 the Unity Council had been used sparingly. The locals had not coordinated bargaining activity or used strategic communication, nor had the USW international pushed for more synchronized activity. In 1999, USW district director

Dave Foster (a former employee at the St. Paul North Star facility) called the USW's Strategic Campaigns department to see if the international could do something in the way of calling the North Star locals together to discuss a more coordinated strategy (Newhouse 2004: 2). Melinda Newhouse described the USW Strategic Campaigns Department's role:

[D]oes work with Locals who are in serious fights where labor dispute is currently underway...and then we kind of carved out a section where we spent time preparing Locals who thought they were going to have a difficult fight about putting together a campaign and doing this kind of stuff before your contract expires in the hope of avoiding it. And then we just kind of get called in from time to time by directors or someone else about some sort of special project that is going on that they want special attention on, which Northstar (sic) was one of those type events... (Newhouse 2004: 1)

Cargill's size and disarticulated structure (Cargill focuses on farm machinery, meat processing, agricultural research and development, steel is a very small part of Cargill's operations) gave the four Locals limited bargaining power and most Locals had been used to less than great contracts. Cargill's financial resources and its private ownership status made the Locals think twice about striking. Melinda Newhouse explained that the Locals:

[H]ad a regular pattern of getting together and then breaking apart and Cargill was just very divisive and did a very good job at keeping them so that they didn't expire within smaller chunks of time. So they were spread out over three years... they had a history of talking to each other...but not much more than that. And they were all very tentative about what they thought we could accomplish. It's Cargill and they knew it was Cargill and the company had instilled some fear into, you're obviously not going to go out on strike against Cargill, they have more money than you. (Newhouse 2004: 3)

Despite hesitation (and/or lack of confidence) and the looming shadow of Cargill's institutional and financial power (Cargill is one of the largest privately held corporations in the world) the four Locals decided to try to bring the four contracts



into line, or at least more so than they currently were. This process would entail extending bargaining and working under the provisions of the expired contracts without a current contract in order to align the expiration dates of all four contracts. The first of the four to expire was Beaumont's (2/7/02), followed by Calvert City (3/14/02), Wilton (11/1/02) and finally, St. Paul (3/31/03) (Kleiman 2004: 27). The hope was to extend the Beaumont bargaining all the way to the St Paul expiration date over a year later, but a more realistic goal was to get it to Wilton's in November. The St Paul contract was also a benchmark because of its successorship language and more generous retiree benefits.

Because of Cargill's financial might and ability to divide the locals, it would take more than just talking to each other through sporadic conference calls to withstand Cargill's pressure. Locals would need to educate their own members about why it was necessary to continue bargaining, which would be somewhat difficult without a tradition of coordination amongst the Locals, but could be made easier because some Locals (especially the Beaumont Local) had been getting subpar contracts and were ready to do something to improve their situation. Locals would need to coordinate mobilization activity amongst each other when it was their turn to bargain with Cargill. Cargill needed to know and feel that the Locals were working in coordination.

To do this the Locals started small with sticker days, support letters, petitions and hand bills. "Very minor things, but things that tied them together and made the others feel like they were a part of it" (Newhouse 2004: 26). To escalate this pressure Beaumont Local 8586 president Pete Savoy traveled to the Wilton facility to attend a bargaining session with the company. "Pete was there, they (Cargill) didn't like it, Pete loved it, the Iowa Local loved it, Pete's Local loved it" (Newhouse 2004: 31). Savoy's presence at the table let Cargill know the tone had changed and that Cargill

needed to get serious about bargaining with all four locals fairly. Sending workers from one facility to another also helped facilitate communication amongst Locals and kept the rank and file involved in the campaign.

The USW also confronted Cargill through the media. “[W]e ran some radio ads around retiree health care... The Locals loved that. We did that, we had a whole media, we did a billboard in Beaumont, we did radio in Wilton, we did a full page newspaper ad in Monroe<sup>4</sup> and St Paul... we may have had a small billboard” (Newhouse 2004: 31-32). The USW International became more involved in strategic research, reaching out to other unions who had bargained with Cargill and exchanging contracts and bargaining strategies (Newhouse 2004: 34) and identifying vulnerabilities in Cargill’s corporate structure. One of the reasons the media actions were so effective was Cargill’s desire to protect its image. “We did radio stuff and billboards and they hate media attention, that’s one thing they really don’t like” (Newhouse 2004: 34).

In 2003, after a little over a year of coordinated actions between the locals, Cargill and the USW reached agreements on expiration dates for three of the four minimill contracts<sup>5</sup>, all within six months of each other. The contracts also presciently included successorship clauses because the USW had gotten word of Cargill’s intention to sell the four facilities. Worried that Cargill would sell them off one-by-one, successorship was included in all contracts in order to guarantee continuity of union representation.

The 2002-2003 campaign to line up the North Star contracts was important for two reasons. First, it introduced a repertoire of mobilization amongst the locals.

So this was fascinating...you had these four different units plus some waiting for a first agreement that didn’t connect that had bad blood that in fact played against each other. You had an employer that was trying to get major

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<sup>4</sup> A UAW-represented North Star facility in Monroe, Michigan was also participating in some of the Unity Council activities, though it bargained on its own.

<sup>5</sup> The Calvert City Local only participated in the coordinated campaign.

concessions in different ways, in different plants and ultimately owned by an employer that was planning to get rid of them and was very powerful so you can see if you had not brought people together...and not succeeded in getting the things she's won, close to common expiration dates, the successorship language right now they'd be selling it off piece by piece, probably a non-union in the end (Kleiman 2004: 43)

The locals mobilized their membership local by local though more regular communication, rank and file actions such as flyers, petitions and sticker days and used media outlets to educate the public and shame the company with billboards, radio slots and newspaper ads. The USW Strategic Campaigns department helped the locals to coordinate amongst each other by allocating full-time staff attention and using strategic research to identify in Cargill's complex corporate structure.

It is important to remember that all of these actions were done by activating the nascent Unity Council structure. While the Unity Council was created specifically for activities such as this, prior to 2002 it had only been used for sporadic phone calls, not for coordinated activities. A functioning network of locals at a powerful MNC would become very important during the Gerdau campaign by providing another level of coordinated activity to integrate into a broader, more global, campaign. Much like the Brazilian Gerdau network, the Unity Council provided a national level structure from which to coordinate activities, one that did not have the same difficulties that a global network would face, such as language and communication barriers.

Second, the campaign ultimately won the locals successorship clauses in the face of an impending sale (at the time to an unknown buyer). It is quite possible that without this contract language, the locals could have been sold off individually, breaking the power of the Unity Council. Though the USW did not know the buyer at the time of the 2002-2003 campaign, it was prescient in its insistence on including successorship language, especially since the buyer was an anti-union firm like Gerdau Ameristeel. Ameristeel was to test the USW quickly and swiftly in the 2005 Beaumont

lockout, seeking to break the union as soon as it could. It is possible that without the successorship language, Ameristeel could have broken the union.

What seemed like an important step forward for the four minimills through their domestic coordination would become magnified during the global campaign of 2005-2007. The 2002-2003 contract coordination maneuvers built a bond of both militancy (towards a common employer) and trust between the locals. These two postures would both be put to the test during the ensuing two years of struggle and establish the foundation for the more global agenda to come.

### *Gerdau Acquisition*

An acrimonious round of negotiations with Cargill/North Star led up to the sale to Gerdau. Cargill had made it known to the union that they were shopping the North Star subsidiary around to potential buyers, significantly impacting the nature of negotiations. “It was clear what they were trying to do is make it more attractive to buyers by getting rid of retiree insurance” (Kleiman 2004: 19). Cargill wanted an attractive product to show off to suitors. Consequently, a successorship clause and card check neutrality became major issues to the union bargaining in 2003 (Kleiman 2004: 25). While the company eventually gave in on successorship, the union didn’t get the card check language they had hoped for. While the Steelworkers’ relationship with Cargill/North Star was usually a contentious one, Cargill never actively attempted to break the union. Cargill used its power at the table to fight the union, but never crossed the line between tough bargaining and actively breaking the union. The difficulties in the 2002-2003 Cargill bargaining were a harbinger for the even more difficult fight to come with Gerdau, testing the locals’ ability to hold together and use strategic coordination to hold their ground at the table.

The Cargill/North Star locals were about to go from the unique difficulties of bargaining with a large, privately held “dis-integrated corporation” (Brecher and Costello 1998) where the company has diverse holdings in multiple industries and makes significant profit from the buying and selling of these subsidiary groups in a short term strategy, to bargaining with a publicly held multinational corporation seeking vertical and horizontal integration in the global steel industry. The differences would be great, but it would seem that, structurally, Gerdau would offer a new chance to establish a stable bargaining relationship, and because it was a publicly held company, more leverage in bargaining. Either way, though, the Beaumont plant was still behind the other three minimills in terms of wages, industry position and potential leverage capability.

In October 2004, the sale of Cargill’s North Star Steel facilities to Gerdau Ameristeel was finalized. The four main mini mills in Beaumont, Wilton, Calvert City, and St Paul, along with three (non-union) wire rod facilities (two in Texas and one in Memphis) and a grinding ball plant in Duluth, Minnesota (also non-union) were sold for \$266 million to Grupo Gerdau’s North American subsidiary, Gerdau Ameristeel (Metal Center News 2004: 47-48). This move turned Gerdau Ameristeel into the second largest mini mill operator in North America, behind only Nucor. As a subsidiary of Brazilian based Grupo Gerdau, Gerdau Ameristeel was formed in 2002 with the merger of Co-Steel Inc. and Ameristeel Inc., its North American headquarters remaining in Tampa, Florida (Metal Magazine 2004: 6).

### *Negotiations and Lockout*

Bernie Kleiman put it bluntly, “Cargill didn’t really see a future in steel and course the steel was very bad in 2002 and 2003... Texas’s been a horrible loser.” (Kleiman 2004: 30). The new beginning with Gerdau was seen as an opportunity for

the USW to forge a new relationship on a “blank slate” of bargaining. Reviews of the new company were mixed. On one hand, the company publicly promised to work with the union. Tampa CEO Phillip Casey’s comments to the media described the merger as “a dynamic step in the continuing revitalization of the North American steel industry” (Metal Magazine 2004: 6) and from Brazil, Jorge Gerdau’s stress was on “strong market position” and “growth through consolidation” (Robertson 2004: 10). On the ground, the attitude was similarly upbeat. On the eve of Christmas, just weeks before bargaining was set to begin, Steve Roane, environmental manager at the Beaumont plant stated “Our employees have a lot of pride...Since the acquisition, there is a new sense of life in the mill” (AMM 12/20/04: 19).

On the other hand, the USW was familiar with the Ameristeel half of Gerdau Ameristeel. Ameristeel management (the Tampa-based North American subsidiary of the Brazilian Grupo Gerdau) was made up of executives of the former Florida Steel, a viciously anti-union firm who had a long history of illegal union-busting tactics dating back to the 1970s and 1980s. These same executives who had tangled with the USW twenty years before were now intent on flexing their muscle at the bargaining table in Beaumont (the first of the four contracts to expire under Gerdau management).

The former North Star locals were at a structural disadvantage as well, as the USW only represented three Gerdau mills, two in Canada and one in New Jersey, leaving the union with little density and contract talks looming soon after the merger. While the Canadian locals had participated in the global network, meeting with Brazilian and Chilean unionists, bargaining at both Canadian and the New Jersey shop had been done individually. There had been no attempts at coordinating bargaining or organizing a communication network like the North Star Unity Council.

The company’s optimistic attitudes and lofty promises of familial relations were quickly doused by the tenor at the bargaining table. Beaumont (Local 8586), with

their contract expiration on March 31, 2005, was the first local to bargain with Gerdau. As the first to bargain, the relations in Beaumont would set the tone for the rest of the locals in the following year. The local, with a history of getting inferior contracts, finally had a chance to set the pattern for the rest of the locals. Gerdau saw it the same way and took to the offensive.

In the first sessions, the two sides were far apart on almost every issue: wages, benefits, working conditions and health insurance, but the union was not expecting the demands the company came to the table with. Echoing the industry trend, the company proposed a consolidation of 24 job categories down to 10 and called for unrestricted right to contract out any work it wanted or relocate bargaining unit work to any other Gerdau Ameristeel facility. Union workers had previously received overtime after any time worked over 8 hours in a day, but the company pushed for overtime based on hours worked over 40 hours in a week. Directly related to this was the request for an increase in the amount of mandatory overtime one could work in a day from 12 hours to 16 hours (Local 8586 Negotiation News 3/22/05). This was not only an affront to the current union contract, but an obvious health and safety risk waiting to happen. This meant an employee could be forced to work a 16-hour day and not receive any overtime pay. Vacation was cut from 2 weeks after 3 years to 3 weeks after 7 years. Management wanted probation extended from 150 days to 1,040 hours (around 6 months). Finally, one of the major sticking points became the length of the contract itself, the company pushing for a full 4 year contract and the union calling for a 2 year contract to try and line up the contract with the Kentucky plant, set to expire in 2007 (Local 8586 Negotiation News 3/22/05).

For the union's part they continued to look to the historically strong contracts they'd been able to bargain with the larger integrated steel companies as the pattern for Gerdau bargaining. "We are interested in a contract that looks a lot more like what

International Steel Group negotiated with the former Bethlehem Steel, and U.S. Steel Corp. did with the former national Steel in terms of various corporate governance provisions, plant and job security provisions” (Leonard 3/31/05). “The USW spokesman said he believes the reason little progress has been made is Gerdau Ameristeel’s lack of experience in dealing with organized labor” (Leonard 3/31/05). Either way, Local 8586 continued bargaining until the contract expiration, despite the sense that management was dug in and wouldn’t be moving any time soon.

To emphasize the gravity of their concessions package and set the new tone of labor relations at Gerdau, the company brought lawyers from union busting firm Ogletree-Deakins to negotiate. Previous negotiations with North Star/Cargill had been conducted with plant managers and Cargill management, never corporate lawyers.

Negotiations continued to be polarized, with each side far apart on the major issues and little in the way of compromise or common interest. By the time contract expiration arrived in late March little had changed. The Steelworkers described management’s proposals as “preposterous” and “ridiculous,” and said that “nothing had been resolved and very little progress has been made,” telling management that “They need to get in the same ballpark” (Leonard 3/31/05). Both sides agreed to continue bargaining, the Steelworkers not prepared to strike and management still with a few forcing tactics in their arsenal. Local 8586 workers went back to work under the terms of the old contract (minus the arbitration option for grievances and dues check off) and agreed to a four hour notice if ready to strike (Robertson, 4/4/05). Through April and mid-May, progress at the table varied from “far from mature” (Leonard 4/8/05) to “some progress” (4/25/05) back to “stagnant” (5/6/05).

By early May each side began to show signs of alternative strategies for resolving the near impasse at the table. A federal mediator, Steve Fischer, was called in to help facilitate the bargaining. The union continued its insistence on resolving the



problem at the table, a USW representative claiming, “We’re not giving up without a fight” and “the workers would do whatever the union asked of them” (Leonard 5/6/05). Management began to hint that since their strategy of getting the union to immediately accept concessions through traditional means wasn’t working, they were making preparations for work stoppages. A Gerdau spokeswoman claimed, “Our strategic customers have been covered for the next 60 days” (Leonard 5/6/05). On May 9th, just days after public comments about the company’s readiness for work disruption, management raised the stakes and placed its “last, best and final offer” on the table.

Two pieces of news give texture to the ensuing lockout and union strategic campaign. First, Gerdau Ameristeel president Phillip Casey gave the Steelworkers (and investors) a hint to the ensuing tone for labor relations at Gerdau the night before the lockout. At a dinner speech to the Pittsburgh chapter of the Association of Women in the Metal Industries, Casey questioned the loyalty of American workers, accusing them of being “less loyal to the company than workers in developing nations,” and claiming workers in Korea, Japan and Brazil have “a greater respect for work ethics.” Casey continued to define the position of the company, describing “medical benefits, workers compensation, retirement, environmental” benefits as a “burden” (Undated USW leaflet). Second, Gerdau announced its North and South American sales revenues were up from \$5.5 billion in 2003 to \$8.8 billion in 2005, a growth of 48%. With record profits and arrogance towards its American union workers, Gerdau Ameristeel locked out its workers (Steel Times International February/March 2005: 8).

USW International didn’t see it coming. Pete Savoy didn’t see it coming, and neither did the 265 members of Steelworkers Local 8586. The company notice to the USW stated:

We regret that, despite our good faith efforts, the union committee has left us no bargaining room on aspects of the agreement that are key to the long-term, successful operation of the mill. For that reason, the company has elected to exercise its right as provided by the National Labor Relations Act (NLRA) to cease operations at the Beaumont mill until such a time as a satisfactory agreement can be reached. (Gerdau Leaflet, 5/26/05)

No one actually thought the company would go so far as to shut down a profitable mill and lock out its workers. Relations with Cargill/North Star had been difficult, but contracts were eventually resolved without a work stoppage. The next day, after first shift workers got off at 3PM, Gerdau shut the Beaumont plant down and told all union employees to leave by 7PM. USW International was notified and Pete Savoy quickly called a meeting for the next morning to set up picket lines and discuss strategy.

The lockout of the Beaumont local, while a surprise, was not completely unexpected by the USW international. Before exchanging initial contract proposals Gerdau had already hired the notorious union-busting law firm Ogletree Deakins to conduct negotiations with the USW. The Beaumont local was the first plant to negotiate with Gerdau management. The company saw this as an opportunity to take the offensive and set the pattern for the ensuing Steelworker locals. Beaumont was historically the weakest and had the least amount of leverage to effectively fight back against a company attack. Gerdau wanted to put the union on the defensive and break the solidarity of the former North Star locals. Seeing an opportunity to set the pattern for the ensuing negotiations, Gerdau Ameristeel management took an aggressive stance and offered a concessionary contract. Much of the American management was made up of old executives from Florida Steel who were used to union busting tactics. These same executives had been used to running a more or less non-union company in North America, save the two USW plants in Canada, and were not willing to let the USW come in and set the tone of the relationship. Previous comments by union officials had referred to Gerdau's "lack of experience in dealing with organized labor"

(see Leonard 3/31/05) and company officials had not been shy about emphasizing differences in culture (see Kusic 2/20/06).

### *USW Comprehensive Campaign (2005-2007)*

On June 1, 2005 members of United Steelworkers (USW) Local 8586 held a funeral. This funeral was not held for a fallen union brother injured on the job, nor for a retired member who had passed away. Rather, this funeral was held to mourn the death of trust between Gerdau Ameristeel management and USW Local 8586. 270 USW members had been unexpectedly locked out by their employer, Gerdau Ameristeel. With a coffin labeled “Trust” and a headstone reading “Here Lies the Trust Between the Company and Its Workers: 11-1-04/5-26-05” Local 8586 president Pete Savoy read a eulogy chastising an Ameristeel management that had “gone back on its word, violated our trust and broken the law.” Union members led a seventy car procession and motorcycle escort to bury this trust in its “final resting place” outside the union hall (Steelabor 2005: 23). TV cameras rolled and the story led on local news channels.

Local actions and community support such as the funeral would be just one of many important components of a broad comprehensive campaign to end the Beaumont lockout and attain contracts for all North American Gerdau locals between 2005-2007. Immediately after the May 2005 lockout there remained hope that a settlement would be reached without further escalation. But as weeks turned into months, workers in Beaumont and USW staff in Pittsburgh became more pessimistic about the hopes for a quick settlement. Negotiations continued off and on but little progress was being made at the table. Ameristeel management was not just using the lockout as a scare tactic to get some concessions but as a full-blown effort to break the union and set the tone for upcoming negotiations with the other three former North Star locals.

The USW's leverage at the bargaining table was limited. Under the Bush administration, the NLRB had been sapped of its will to intervene on the behalf of unions. The Beaumont facility was the least profitable of the four recently acquired North Star plants, meaning the economic pressure from a work stoppage would not be sufficient to deter management from a long dispute. Beyond this, Ameristeel management had picked a fight with the USW and was ready to dig in and absorb some losses in order to set the precedent for the rest of the former North Star locals.

Beaumont is located ninety miles east of Houston and three hours west of New Orleans, just on the Louisiana border, not a traditional stronghold for USW. Ameristeel management was located in Tampa, also not a site of community pressure. Texas and Florida were both "right-to-work" states with a long record of anti-union administrations. The USW would need to include Beaumont and Tampa in its strategy, but ultimately look elsewhere for more effective sites of leverage. Understanding Gerdau's global reach meant there would be many sites of leverage, rather than just one. The USW and union allies would travel to Beaumont, Tampa, Wilton, Iowa and St Paul, Minnesota, as well as far-flung places such as Toronto, São Paulo, Buenos Aires, Montevideo, and Maranhão, Brazil, to build a global campaign.

Ameristeel managers were responsible for the labor relations in all of North America including bargaining with unions. North American management had autonomy in setting the tone and designing the tactics for local bargaining. There was no reason to believe that the decision to pursue a lockout strategy came from anywhere except Tampa. But, just because Ameristeel management had autonomy in setting the tone of labor relations in North America didn't mean that it was independent in all decisions. Ameristeel was still *Gerdau* Ameristeel and ultimately accountable to its Brazilian owners.

Understanding this key circuit of power between North America, Tampa and Brazil was crucial to designing a campaign strategy for the USW. Power ultimately resided in Brazil. In order to convince Ameristeel management to negotiate and sign a fair contract with Beaumont, and eventually the other North American USW locals, the USW would need to convince Brazilian management to intervene in Tampa's affairs and settle the lockout and contract disputes. Brazil would need to send the message to Tampa that its labor relations policies were interfering with Gerdau's overall ability to make profit. This campaign dynamic created a sort of "boomerang effect" (Keck and Sikkink 1998) for the USW. The local blockage would only be resolved by taking the campaign international, mobilizing a global network of allies and building sufficient pressure to bring national management back into line.

The second and more practical reason behind the USW's campaign strategy was that Gerdau was not a household corporate name in North America, nor was there a public brand to Gerdau. Its steel went primarily into rebar and construction projects. These factors precluded a public campaign concentrated in the US. But the USW knew that the situation was the reverse in Brazil. Gerdau is a well known corporate entity throughout Brazil, being one of the few (albeit of a growing number) Brazilian multinationals acting on the world stage, its president Jorge Gerdau is a well known corporate citizen, philanthropist and public figure in Brazil, and the company had a public presence through advertising and retail stores.

Even with a network of allies willing to support the campaign, the USW needed to be careful not to interfere with the livelihood of Brazilian workers. A campaign focused on Brazil had the potential to affect Gerdau's overall profits, perhaps causing Brazilians to lose their jobs, face retaliation for the actions of a North American conflict, or create tensions in the hard earned trust between the CNM/CUT and USW. The campaign message would focus on US workers, the lockout (and later

the open contracts), and the disparity between the North American management's aggressive anti-union stance versus the Brazilian management's more "family-oriented" management style. The campaign would need to end the lockout in Beaumont, but not at the expense of the jobs and relationships of the workers in Brazil.

In order to carry this out, the campaign would focus on three main tactics: participatory internationalism, the use of Jorge Gerdau's image, and a broad, comprehensive campaign. First, rank and file workers from North America would need to play an active role in the campaign. They would be the messengers telling their personal stories of the lockout, Gerdau's broken promises and the need for a good contract. Brazilian trade unionists were used to stories of Northern multinationals mistreating their employees. Poor working conditions, flouting labor standards and disregard for unions had been the common trade of multinationals in Brazil for years. But the image of a *Brazilian* multinational acting in this manner was difficult to comprehend for many Brazilian unionists. Companies don't have recourse to a "lockout" in the Brazilian labor system, nor is there a word for "lockout" in Portuguese.<sup>6</sup> US workers would need to travel to union halls and community centers, speak face to face to union brothers and sisters, to the media and to politicians to explain the lock out and, ultimately, what Brazilians could do to help.

Second, Jorge Gerdau would remain the central image of the campaign. Although Ameristeel management would be the ultimate movers in ending the lockout, the USW realized that Ameristeel management would never end the lockout and sign a contract of its own volition. Ameristeel managers would need to feel some form of pressure from their corporate owners in Brazil in order to address the USW.

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<sup>6</sup> Lockout is either transliterated directly into Portuguese as "locaute" or referred to as a "*greve de empresa*" or "company strike"

Jorge Gerdau himself would need to send the message to Ameristeel management. Therefore the campaign in Brazil would need to highlight Jorge's *inaction* vis a vis the Beaumont lockout. Ultimately Ameristeel management was beholden to Brazilian higher ups, which meant that Brazilian management had to take some responsibility for the actions of Ameristeel management. Because Jorge Gerdau was both the symbolic and actual head of the company he would be at the center of the USW's campaign. Campaign messages would focus on the North American lockout by highlighting Jorge's inaction in the situation. This message would manifest itself in stickers, leaflets, and ads with Jorge Gerdau's blank profile with a heading of "Where's Jorge?"

The campaign also could not make a blanket condemnation of Gerdau management, or portray Gerdau on the whole as bad company. Doing this would backfire on the USW in the long run and potentially alienate Brazilian allies. Rather than painting a portrait of Gerdau as a "corporate outlaw" with a broad stroke, as is sometimes done in campaigns, the USW's message was subtler. The message would focus on the "Two Faces of Gerdau." Why did Gerdau respect its employees and bargain with unions in Brazil and other countries while practicing union busting in North America? Why was there a double standard for the two groups of employees? This message would highlight the anti-union practices of Ameristeel management while reinforcing the good image of Brazilian management. Fairness and a common set of standards for all Gerdau employees would be the thread that held workers on both sides of the equator together.

Third, the USW's campaign would need to focus on Brazil, especially on Jorge's image, but it couldn't do this at the expense of a broad campaign integrating allies beyond the Brazil-Tampa axis. The Brazil-Tampa axis was the most important, but not the *only*, site of leverage. Gerdau is a multinational firm with operations, joint

ventures and subsidiaries in more than a dozen countries. A broad and active network of union allies already existed in most countries where Gerdau had production facilities. If the USW could mobilize a broad and escalating global campaign it would make it much harder for Gerdau to endure a comprehensive campaign otherwise focused on one or two tactics.

To do this the USW would expand its campaign to utilize the network of allies through coordinated and sustained solidarity actions. North American workers would make their case in newspaper interviews, radio ads and on TV shows. Gerdau shareholders would hear directly from USW members at shareholder meetings. Politicians in the US would fly to Brazil to meet with Jorge Gerdau. The GWWC and PT allies would contact Brazilian President Lula da Silva to block Jorge Gerdau's appointment to a cabinet position. Customers of Gerdau's steel in the commercial construction trade would be warned of potential product defects of scab-made steel. Gerdau workers would take part in coordinated sticker days inside dozens of Gerdau plants across the globe. The billboards and rallies outside corporate headquarters in Tampa and Porto Alegre would be important, but not sufficient. The campaign would need to follow Gerdau's networks of power and interfere with its profit centers in multiple locations.

### *On the Ground (June-August 2005)*

On the ground in Beaumont workers set up pickets and enlisted community support. Bargaining continued in fits and starts, making progress some sessions, then regressing the next session. Despite the severity of the lockout the USW hoped to resolve the lockout through continued negotiations. Throughout June and July of 2005 the USW and Ameristeel management exchanged proposals, but these proposals were matched by increasing animosity in the media and a sense of resignation that the



impasse would take longer than expected (Leonard 7/14/05). The USW and Gerdau management each ran full page ads in the local Beaumont paper accusing the other of holding up negotiations (Beaumont Bargaining Update 2005).

By July, USW representatives in St Paul were preparing for a tough round with Gerdau with the pall of the Beaumont lockout hanging over upcoming contract negotiations (Leonard 6/7/05). The St Paul local eventually decided not to strike but to remain on the job working under the terms of the old contract but with a 72-hour notice of extension (Leonard 8/2/05). The Wilton, Iowa contract would expire September 30. The 270 members of Local 8586 in Beaumont continued to be locked out with their negotiations stalled as well. The question for the USW was how soon to muster its resources and initiate a broader campaign.

### *Global Campaign*

By August the lockout was in its third month with little in the way of progress at the bargaining table. The two sides continued to meet, at least in theory, but the Beaumont workers remained locked out with no end in sight (Gerdau was now ironically calling its bargaining strategy “reality-based bargaining” (Beal 2/13/06)). The Unity Council continued to meet and Beaumont workers had traveled to the other locations to tell their stories of Ameristeel’s behavior. Leaflets, newspaper ads, radio spots and local rallies had come and gone in the U.S. but the situation remained at more or less the same location it was the day after the lockout. Ameristeel wasn’t budging. These tactics hadn’t worked, and more USW contracts were about to open up, meaning more steelworkers working without contracts. The USW decided that it was time to escalate the fight and take it to Brazil.

The week of August 12, 2005, Gerdau Ameristeel executives in Tampa, Florida were surprised by a group of unwelcome guests. Two Brazilian labor leaders,

Fernando Lopes of the CNM/CUT and Nair Goulart of Força Sindical, traveled to the Tampa headquarters of Gerdau Ameristeel to deliver a petition to Ameristeel chairman Phillip Casey. The petition was signed by their Brazilian coworkers called for Ameristeel management to end the lockout and negotiate a fair contract. The delegation entered the building and even got into the elevators before being intercepted by Ameristeel managers on the sixth floor. The group was eventually escorted out by security and police called to make sure they didn't return (Unity Council 9/8/05). Outside, a group of fifty supporters held a rally passing out leaflets and calling media attention, in both the U.S. and Brazil, to Gerdau's union busting (Robertson 8/12/05).

Lopes, Goulart and the Beaumont leaders went on to the other former North Star locals to rally support and discuss future actions. In an interview Lopes explained the lockout from the Brazilian perspective "I think the company is trying to take advantage of what they see as a weakness among the workers. They thought the workers would just take whatever offer they made, and they are acting based on the weak enforcement of labor laws here in the US. They are not in compliance, in my opinion, with international labor laws, and that is wrong" (Robertson 8/12/05). Gerdau's reaction to the visit in a press release referred to the Lopes and Goulart as "Representatives...from South American special interest groups" (Robertson 8/22/05).

This delegation was followed by a similar attempt to meet with Jorge Gerdau in Porto Alegre in September 2005. The delegation of Brazilian and US union members delivered a letter from locked out workers in the US and met with Brazilian Gerdau workers about the situation of the American workers (Unity Council 9/8/05). Beaumont workers Pete Savoy and Phil Everett, along with USW Strategic Campaigns representative Melinda Newhouse, traveled to Brazil for the first of numerous worker delegations. The three spent eleven days in Brazil meeting with Brazilian Gerdau

workers, participating in leafleting and rallies outside Gerdau plants in Osasco, Cumbica, São Paulo and Gerdau's flagship facility in São Leopoldo, meeting with CUT and Força leaders, local Workers Party (PT) representatives and the federal Minister of Labor and former CNM/CUT leader, Luiz Marinho (Unity Council 9/8/05).

Worker visits such as this first one had multiple effects on the campaign to end the lockout, as well as broader effects on the larger union network as a whole. First and foremost the delegations were an opportunity for Beaumont workers to tell their story directly to other Gerdau workers. Speaking directly to other Gerdau workers put a human face on the Beaumont lockout and gave the Brazilians a new, less flattering, perspective of Gerdau. Fernando Lopes explained, during his August trip to the US, "Usually, we travel abroad to look for help against the multinationals. This is the first time that we are traveling to give solidarity" (Unity Council 9/8/05). Second, US workers were able to take the stories of flyering, rallies, meetings with politicians and the outpouring of support in Brazil back to Texas with them. This bolstered morale back home giving workers incentive to stay united and not give in to Gerdau's pressure. Third, these exchanges sent a message to Gerdau management. It is not an everyday occurrence when locked out US steelworkers show up at the Gerdau factory gates in São Leopoldo, Brazil. Brazilian management got the message and would quickly pass it on to US managers that something was happening. If the USW was willing to spend thousands of dollars to send three of its representatives to Brazil, it was a sign the union was digging in for a protracted fight. Finally, these delegations were opportunities to strengthen the existing domestic networks in both Brazil and the US (the Unity Council). As Fernando Lopes said, "Besides this, the effect is relative, in reality what this experience shows is that the capacity to lend solidarity depends on our capacity for mobilization and organization here in Brazil. We need to improve our

organization and power of mobilization, in order for Brazilian multinational companies see us as true interlocutors for problems which happen in the exterior” (Leão 2005).

These, and ensuing delegations continued to build support on the local level and show Gerdau management in Tampa and Brazil that Gerdau workers were working together globally and wouldn't be pitted against each other. Local 8586 president Pete Savoy continued to be the public face of the locked out workers throughout 2005 as he traveled to Buenos Aires, Argentina for an IMF Steel Conference. The IMF delegates strategized in workshops and passed resolutions supporting the locked out American steelworkers (Metalworld 2005: 24).

### *Recall*

On December 12, 2005 the first members of Local 8586 began to go back to work. Gerdau management announced that the Beaumont facility would reopen and workers would be recalled according to “prevailing market conditions” (Robertson 12/14/05). The USW immediately filed Unfair Labor Practices (ULP's) for Gerdau's refusal to call union members back by seniority and their implementation of its previous “last, best and final offer” terms for the returning workers. Despite these grievances, Local 8586 had won a big victory. All along Gerdau management claimed union members wouldn't be recalled until a contract had been signed, but after six months management caved and began to call workers back. Management's gamble to break the local had failed, costing the company nearly \$14 million dollars due to its idled plant (Kusic 2/20/06).

After six months of being locked out the Beaumont workers began the slow process of recall and returning to work without a contract. Rather than simply claiming victory and returning to the bargaining table to hammer out a deal with

Gerdau, the USW knew the campaign had shifted in rhetoric, but not in tactics. Three Gerdau locals were already working without contracts with more expiring soon. The international fight would continue to escalate until all Gerdau locals had contracts.

### *From Lockout to Contract Campaign*

As the Beaumont workers were slowly recalled, the new focus of the campaign spread from the lock out to the growing number of US locals without contracts. Beaumont was working without a contract, as were two other former North Star locals, St Paul, MN and Wilton, IA. While the lockout was over, the ultimate goal of contracts for all North American Gerdau facilities stayed the same, as did the global reach of the campaign. The campaign would escalate from unannounced visits to management to international days of action, speeches at the shareholders' meeting, coordinated billboards in two continents and meetings with political allies in the US and Brazil.

Gerdau itself was also expanding. Over the course of 2006 it would grow from the fourth largest minimill company in the US to the second largest. In March, 2006 Gerdau acquired Sheffield Steel's three minimill facilities in Sand Springs, OK, Joliet IL and Kansas City, MO. All three of these facilities were represented by the USW and, like the Ameristeel facilities it was joining, all three had open collective bargaining agreements. These three USW shops would quickly join the former North Star shops in their global fight for contracts. Gerdau had also expanded its reach in the Americas by acquiring recently privatized Sindiperu, Peru's largest steelmaker. Gerdau also made its first acquisition outside the hemisphere buying three Sidenor facilities in Spain. By 2007 Gerdau would become the fourth largest overall steelmaker in North America after its acquisition of Chapparral Steel and MacSteel. Globally, Gerdau expanded into Mexico and the Dominican Republic, created a joint

venture in India, and consolidated downstream iron ore production in Brazil (Gerdau Annual Report 2007).

Gerdau's strategy of acquiring existing production facilities meant the network of Gerdau unions was expanding as well. In 2006 and 2007 the North American campaign would continue through worker exchanges, delegations, coordinated actions and pressure on Gerdau stakeholders. But, as the campaign expanded to new sites of leverage, more complex lines of communication and coordination would be needed as well. When the axis of the campaign remained between the US and Brazil, coordination could be effectively handled by USW campaigners located in Pittsburgh and Solidarity Center representatives in Uruguay and Brazil. These campaigners could travel to Brazil with North American workers as needed for delegations and rallies or rely on the Solidarity center representatives to help with logistics. But, as the Gerdau campaign escalated to include more coordination broadly, it would also need to expand deeper into Gerdau's channels of power, especially in Brazil.

In order to do this, two important steps would be taken. First, the USW would hire a staff person to work in Brazil full time. Carolyn Kazdin, former representative of the AFL-CIO Solidarity Center's office in Brazil, became the full time organizer to coordinate joint actions between North America and Brazil. Her work would be important not just in ending the Beaumont campaign, but as a full time bridge builder who could maintain continuity of organization after the campaign had finished. Kazdin had connections and relationships with key Brazilian trade unionists, politicians and community leaders stemming from her time at the Solidarity Center. By having full time staff on the ground, the campaign would have a direct line of communication between Pittsburgh and Brazil. This would aid both the speed of communication and the depth of activity between unions.

Second, both the level of campaign activity and the continued corporate expansion of Gerdau would engender a similar expansion of the Gerdau union network. In November 2006 Gerdau unions from nine countries would meet for the III International Meeting of Gerdau Workers in Porto Alegre and take the important step of establish the GWWC. Beyond semantics, the foundation of the GWWC was important because it petitioned Gerdau management for recognition as the negotiating body for all Gerdau workers globally and, likewise, launched a formal campaign for negotiation of an International Framework Agreement (IFA). While Gerdau management rejected both of these proposals, their introduction was an important sign of organizational maturity. As Gerdau expanded to new countries with unionized workforces, these workers and their union representatives needed to be included in a more formal, transnational union body. Furthermore Gerdau management was showing a more anti-union posture in countries such as Peru and Colombia, not just in the US. Similar Human Resources and Quality of Work Life (QWL) programs were being implemented by Gerdau management in all countries. The GWWC created a platform for unions to compare health and safety standards across the firm and push for more uniform standards for all Gerdau workers. And, the escalating campaign was mobilizing workers not just in North America and Brazil, but in Spain, Argentina and Mexico, too. A more formal, yet flexible structure for communication and strategy would be needed to cement the gains of North American workers as well as to ensure continuity of activity once the campaign wrapped up.

### *Global Contract Campaign (2006-2007)*

The 2006 new year started off with a Unity Council meeting in St Paul, MN. The 350 USW members from Local 7263 had been working without a new contract since August 1, 2005. Brazilians Fernando Lopes and Nair Goulart joined the North

Americans for the meetings. The campaign continued to bridge the global and local by reaching out to the St Paul community with a traveling billboard (“street blimp”). The billboard included a photo of a crocodile with an open mouth, showing its teeth with the message: “Gerdau devoured North Star Steel; now it’s after our standard of living. What a crock...” The union parked the billboard outside the St Paul plant and drove it around downtown Minneapolis/St Paul (Kucera 2006).

In February 2006 a delegation of Gerdau workers, USW representatives and Brazilian trade unionists attended the Cornell University Global Unions Conference in New York City, the largest gathering of trade unionists, academics and researchers of its kind. Meetings such as the Global Unions Conference helped spread the message beyond USW and Gerdau circles to a more extensive network of international trade union activists and academic researchers.

Coordinated solidarity activity continued through the first half of 2006. Local 8586 president Pete Savoy returned to Brazil in March for more rallies, interviews and meetings. Savoy’s trip intersected with a global day of action involving union workers in all eight countries with Gerdau facilities. Workers wore stickers on their hardhats featuring a hand holding a large hammer (USW leaflet 2006). The “union hammer” was a spoof of one of Gerdau’s ubiquitous advertising campaigns endorsing Gerdau’s quality products and urging consumers to “Give it the hammer test.”

Gerdau’s 2006 annual shareholder meeting was held in Toronto, giving the Canadian locals to get involved directly in the campaign. Thirty-five USW workers and representatives as well as Fernando Lopes of the CNM/CUT attended the shareholder meeting in May. Local 8586 president Pete Savoy addressed the room, speaking directly to CEO Mario Longhi, former CEO Phillip Casey, who authorized the 2005 Beaumont lockout, and the complete Ameristeel board of directors. Local 8581 (Wilton, IA) president Bill Clevinger presented a petition to Jorge Gerdau who



was sitting in the front of the room. The petition was signed by USW members from plants where contracts had expired. The shareholder meeting was also an important opportunity to highlight the different attitude taken by US management versus Brazilian management. “We’re sure that if he comes and visits our plants and searches for the truth, heads will roll at Tampa headquarters, where all the lies have originated and where the union busting scheme was hatched and financed,” claimed St. Paul local president Mike Wodaszewski (Unity Council May 2006). Jorge Gerdau himself was again the center of the union campaign, stressing the central role he would have to take in order to circumvent US management and end the growing impasse.

Local leaders Jim Whitmore from Wilton, IA and Ben Hallas from St. Paul, MN crisscrossed Brazil participating in rallies outside Gerdau World Headquarters in Porto Alegre, meeting with Gerdau workers in the northern state of Maranhão, giving interviews on radio programs and addressing a state level NGO Forum (Marreta Neles 2006). The North Americans addressed union delegates at both the Ninth National Congress of the CUT as well as the First Congress of the National Confederation of Metalworkers of Força Sindical (CNTM/FS) (Unity Council 2006). These appearances spread the message to a national audience, not just to Brazilian Gerdau workers.

The second half of 2006 progressed with a similar pattern of worker delegations, coordinated actions and a focus on Jorge Gerdau’s image. Billboards with the “Where’s Jorge?” message went up on roads leading to the Sao Paulo, Porto Alegre and Brasilia airports, all airports frequented by domestic and international businessmen. Word of Gerdau’s anti-union practices needed to get to the boardrooms as well as the shop floor.

The USW upped the ante in August by releasing a report sent to media and Gerdau shareholders entitled “Saving North American Steel.” In it the USW highlighted its role of working cooperatively through mergers and restructuring with

firms such as Goodyear Tire, LTV, and USX, which respected the USW's seat the bargaining table. The report also contrasted these productive relationships with the case of Oregon Steel which endured a six year strike of 1,100 USW members. Oregon Steel eventually lost hundreds of millions of dollars in idle plant time, back pay awards, and loss of share valuations. The USW outlined the consequences of a potential strike at Gerdau: financial losses by plant, loss of market share and reduction in share value. The USW estimated Ameristeel would lose \$2.5-\$3 million per day and more than \$50 million in sales and fixed costs per trimester (USW 2006; Nakamura et al. 2006). Gerdau had the option of having a cooperative relationship with the USW or facing the consequences of a potential strike. A coordinated sticker and petition day in January 2007 followed this shareholder report under the theme "Deal or No Steel."

### *Domestic Actions*

Actions focused on winning support in Brazil, but the campaign maintained a broad based, multi-scale, escalating campaign in North America as well. The Unity Council structure remained at the center of organizing these coordinated North American actions. Throughout 2006 locals participated in a series of coordinated sticker days, informational picketing sessions, signs on cars, and visits to and from the Canadian locals. The Unity Council met regularly and published a newsletter keeping local informed on international solidarity, national coordinated actions and the progress of local bargaining sessions.

On a local level, unions rallied their communities through frequent leaflets and community outreach. Support from political leaders was extensive as well. State and US representatives such as Minnesota Senator Mark Dayton and House representative Betty McCollum, Texas representative Sheila Jackson-Lee and Iowa governor Tom Vilsack sent letters of support to Jorge Gerdau on behalf of workers (Unity Council,

February 2006). Senator Dayton and former Michigan congressman David Bonior traveled to Brazil to meet directly with Jorge Gerdau urging him to visit the US personally and facilitate a resolution to the growing number of open contracts in the US (Unity Council, May 2006).

In Beaumont, local communities were especially hard hit after Hurricane Rita struck the Gulf Coast in September 2005, giving the struggle of the Beaumont workers added urgency. County commissions and mayors passed resolutions of support for the workers and pushed for Gerdau management to negotiate a fair contract in all locations. Local religious leaders wrote letters of support and added the workers to prayer lists. Local 8586 in Beaumont organized gumbo feeds and other locals organized potlucks and fish fries to keep families, religious leaders and members of the community involved in the daily realities Gerdau workers were facing (USW internal memo, undated).

Beginning in Tampa in December 2005 a retired Steelworker named “Big Nick” Mikatich undertook a road trip of Gerdau facilities and Tampa HQ driving a large truck with a billboard mounted on the flatbed, known as the “Truck of Truth,” to show solidarity. With a set of rotating billboard messages aimed at Gerdau management such as “Gerdau Devoured North Star Steel. Now It’s After Our Standard of Living. What a Crock!,” “Two Faces of Gerdau, Millions for Brazilians. Nothing For Loyal Sand Springs Workers” and “Nolan and Top Execs get nearly \$2 Million. Sheffield Workers and Retirees Get the Shaft” (USW internal memo 12/20/05; Unity Council 1/18/06; 7/06), Mikatich would drive the billboards around each facility, park outside the factory gates, and distribute leaflets during shift changes, inevitably provoking a local HR manager to come out and ask for a flyer or ask Mikatich to leave. One way or another, the USW was determined to make sure Gerdau management was receiving the message of solidarity from multiple sources.

The USW's critique of Gerdau was not confined to labor rights violations. In June the USW filed a suit with the Tennessee Environmental Board asking the state of Tennessee to set up a hearing investigating air emissions levels coming from Gerdau's Jackson, TN facility. The USW sought to review Gerdau's industrial lead emissions permit after research uncovered that Gerdau was responsible for ninety six percent of the lead emissions in the county (USW Press Release 6/22/06).

The campaign reached beyond worker-to-worker exchanges and local labor management relations seeking to influence a wide set of corporate stakeholders Gerdau Ameristeel. Despite being relatively unknown to the average consumer in North America, Gerdau was known within construction and industrial trade circles. In October 2006 workers traveled to Washington, D.C. to a bridge construction trade show to handbill and educate Gerdau customers of the costs of a potential strike by Gerdau workers (USW Internal Memo 10/2/06). Consumer actions such as this added one more piece of leverage into the overall comprehensive campaign, increasing the heat on Gerdau management to negotiate fair contracts.

By the end of 2006 the broad-based escalating tactics began to reap dividends. In July 2006 workers at Gerdau's Calvert City, KY facility won a \$2 million arbitration decision on nineteen months unpaid profit-sharing (Kusic 7/25/06). The Calvert City collective bargaining agreement, signed when the facility was still owned by North Star, included a provision for a profit sharing program. After Gerdau acquired the facility in 2004, it had claimed the program was "discretionary" and refused to pay. The grievance was won under the past practice clause after going to arbitration (Internal Email 7/20/06). Workers from the other former North Star locals won over \$2.3 million in similar back pay settlements later in 2006 (Unity Council 10/6/06). The campaign was not solely global at the expense of the local communities involved. These actions reinforced a central tenet of comprehensive campaigns: for a

campaign to work, it must build support at multiple levels and maintain escalating pressure on multiple sites of the corporation's operations.

### *Settlement*

By New Year 2007, the strategy to divide the two managements and move Ameristeel management by going to Brazil began to show its effectiveness. Workers on the ground in the US began to notice shake-ups in local managements and Brazilian union leaders began hearing complaints about the global campaign. CEO Phillip Casey, one of the former Florida Steel executives and CEO during the Beaumont lockout, had been replaced with a Brazilian, Mario Longhi. Negotiations with management had continued off and on, but were now overseen by company negotiators rather than outside lawyers.

The ground campaign in Brazil began to wrap up in early 2007 when Gerdau Ameristeel management contacted the USW about wrapping up the open contracts in the former North Star facilities at St Paul, Wilton, and Beaumont. As with any settlement after a long protracted fight, the end contract was not a total victory. A large part of the ultimate settlement is the very continued existence of the union after an onslaught of corporate power. The final contract at Beaumont was no exception.

The new contract included settlement of outstanding ULP charges concerning lost overtime, vacation day accrual and recall of USW members after the lockout was ended all in favor of the USW. Other provisions were not so cut and dry (Proposed Agreement 2007). Workers were able to maintain the provisions of the old pre-2004 Cargill-era pension plan. A major source of contention had been the company's intent to overhaul overtime language. Ameristeel had wanted to increase, from twelve to sixteen, the amount of hours it could force employees to work. It also sought to eliminate overtime pay after eight hours and use the state minimum of overtime after

forty hours per week. The USW was able to preserve both of these provisions (Proposed Agreement 2007).

But these hard fought victories were tempered by concessions on sensitive issues such as higher premiums on medical coverage and wage cuts for new hires in the lowest job classifications. The most painful change for the Beaumont workers involved the rewriting of the job classification system. Where there had been an established manual of job descriptions, management now became responsible for writing job descriptions and justifying their pay rate (Proposed Agreement 2007). While these descriptions would have to pass a labor management committee and could be grieved, it was a tough pill to swallow for the local which had taken specific umbrage to this provision.

Tentative agreements for the former North Star locals were finalized in March 2007. Bargaining at the three former Sheffield facilities and one Canadian facility continued through the spring and summer. The North American Unity council continued to meet to discuss and update the locals on the progress of bargaining. In the April meeting of the Unity Council it drafted a letter presented to the May 2007 Gerdau shareholders meeting encouraging management to continue to take negotiations for the remaining open contracts seriously, to emphasize health and safety as common priority for all Gerdau workers globally, and to push for Gerdau management to begin working with the GWWC on issues such as health and safety (Unity Council May 2007). Though negotiations continued to occur at the local level, global strategies continued to be a priority for the Unity Council, and vice versa. The GWWC coordinated another global sticker day with the message of health and safety, a sign of its developing focus on the issue a means for cooperation across-borders (Unity Council August 2007). Former Sheffield locals settled in August and September 2007.

### *Gerdau Workers' World Council (GWWC)*

The Gerdau Workers' World Council (GWWC) was established in November 2006 in Porto Alegre, Brazil. After nearly 10 years of informal strategic partnership Gerdau workers wanted a more formal transnational structure to share information, coordinate bargaining and organizing strategies, and ensure continuity of organization. Seventy workers, union representatives and researchers from Brazil, Argentina, Chile, Uruguay, Colombia, Peru, United States and Canada and the IMF attended the Porto Alegre meeting. The goals of the GWWC meeting were threefold: to continue the ongoing information exchanges on bargaining and local conditions at each Gerdau location; to formally petition Gerdau management for recognition of the GWWC as the bargaining agent for all Gerdau workers; and third, to begin discussions on how to launch a campaign for an International Framework Agreement (Report 2006). Notably, the GWWC sent a letter to Brazilian President Lula asking him to not appoint Jorge Gerdau as Minister of the Interior.

It is important to see the Porto Alegre meeting and the GWWC as not just a sign of global solidarity with the ongoing North American campaign, but as the next step in the decade-long attempt to create a lasting infrastructure for all Gerdau workers to build global bargaining power. Global solidarity meant solidarity not just for North American workers, but for all Gerdau workers. Numerous workers in Colombia had been harassed for their activity in the local union, three workers had died in preventable plant accidents in Bahia, Brazil, and Gerdau was rapidly acquiring new facilities in Mexico, the Dominican Republic, and the US. The GWWC and the international alliances engendered by it needed to expand both in the number of participants and also in the breadth of campaigns to ensure that all Gerdau workers were treated fairly. The formal recognition of the GWWC from the IMF (in the 2004 meetings) helped ease issues of funding for unions in countries such as Peru, Uruguay

and Colombia with fewer resources to send delegates and workers to meetings in other countries.

The establishment of the GWWC in November, 2006 was a key moment for Gerdau workers for three reasons. First, it was the largest (in number of participants) and broadest (in number of countries represented) gathering of Gerdau workers to that date. The coalitions, campaigns, and capacity building work of the past ten years were durable enough to continue. Gerdau was expanding and so were the efforts of unions at Gerdau to maintain a network of communication and organization. Second, the meeting took place at a crucial time in the North American campaign. A little over a year after the global campaign had begun in earnest, the GWWC symbolized the continued solidarity of Gerdau workers globally. Gerdau management continued to hold out and most North American workers remained without contracts. The GWWC meeting was a powerful response to Gerdau's continued intransigence. Third, the 2006 GWWC meeting formally petitioned for recognition as the bargaining agent for all unionized Gerdau workers globally. While Gerdau management swiftly rejected this request, it was just as much a sign to management of the extent of organization and the intent to build continuity. Much as the message of the North American campaign was "we won't go away," the same message applied to the formation of the GWWC. Gerdau workers would not go back to their respective countries and bargain alone. Instead, the GWWC would establish a forum for communication, decision-making and cross-border strategy.

The GWWC met in Montevideo, Uruguay in June 2007 and again in October 2007 in São Paulo to discuss a unified health and safety platform, finalize a global database of strategic research on Gerdau accessible to all workers and researchers and plan for next steps in petitioning international recognition from Gerdau (in the form of an International Framework Agreement) as the bargaining agent for all Gerdau



workers. The most recent meeting took place in December 2008 in Houston, TX, the first meeting held in North America. Union delegates from ten countries (and the IMF) addressed the global financial crisis urging Gerdau to work with the GWWC to generate joint health and safety programs for employees as well as invest in large public infrastructure projects to aid broader national recovery efforts.

## **V. Analysis**

### *Cross-Border Union Networks*

Networks do not appear suddenly, nor do they last without the involvement and engagement of their members. Most networks have been cultivated over many years (and in many languages) through the difficult work of coordinating local activists with internationalist leanings, mid-level union bridgebuilders as well as higher-level union-to-union officials. The Gerdau example is no exception to this. Informal contact began in 1997 and continued irregularly through Steelworker Humanity Fund exchanges, industry and sectoral union meetings (steel industry conferences, GUF meetings), and federation-to-federation contacts. The behind the scenes work of cultivating and expanding networks often goes unnoticed until a crisis erupts, in this case, the 2005-2007 North American campaign. The e-mails, phone calls, newsletters, requests for information, and personal bonds of trust established between local activists and union staff are the glue which hold these networks together. One of the difficulties of writing about these cross-border networks is the often informal formation and evolution of them. Until more formal agreements about structure and organization are established, networks take an unwieldy and “rhizomatic” form (Deleuze and Guattari 1987).

Initially, cross-border networks may not have anything to “show” for their existence; they exist in the personal contacts and exchanges between activists, staff,

and bridgebuilders. But as these networks expand and become formalized, they demonstrate their utility by expanding the scope of possible collective bargaining strategies. Where previously bargaining strategies may have been limited to the local or national levels, cross-border networks create “opportunity structures” for including new points of leverage (Tarrow 2005).

Many other cross-border campaigns have used international solidarity as a tactic to end strikes, lock-outs or to aid organizing drives. International solidarity is hardly a new or innovative tactic. But what is innovative is that unions are making concerted efforts to research multinational firms, understand their structure, and build lasting cross-border firm-centered structures in order to build power across national borders as a long-term strategy. Unions such as the Brazilian CUT, North American USW, German IG Metall, South African COSATU and South Korean KCFTU have all been at the vanguard of cross-border strategies, especially member-centered, cross-border network building at multinational firms.

These cross-border networks differ from broader Global Union Federations or federation-to-federation alliances<sup>7</sup> in that they use common employers as the nexus of organization. While networks are almost always affiliated with GUFs and rely on GUFs for resources and coordination help, networks are autonomous from GUFs in their firm-centered organizational structure. Yet, beyond the characteristic of sharing common employers union networks are a heterogeneous bunch. Further research is needed to identify shared characteristics.

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<sup>7</sup> This is in no way saying that GUFs and federation-to-federation alliances have no role, or are too far removed from local campaigns (see Snyder 2008 for more on the various roles of GUFs in cross-border organizing campaigns). These types of “global unions” are important for their geographic reach (helpful especially for unions seeking to expand networks as firms expand to new countries look for new union contacts), the amount of funding and resources they bring to national and local union disputes as well as their continuity of organization.

### *Coalitions at Gerdau*

The tradition of rank and file coalition building at Gerdau has been the most important component for building a long-term, sustained and comprehensive example of cross-border unionism. More than ten years of trust building, face-to-face interaction, and both North-South and South-North decisionmaking have built a solid foundation for other network activities.

The legacy of the CNM/CUT has been absolutely central in establishing a rich rank and file, member-to-member foundation at Gerdau. It is important to remember that the cross-border network at Gerdau is an outgrowth of the work done by Brazilian unionist activists such as Fernando Lopes during the late 1980s and 1990s. During these years, Brazilian unions in the auto, steel, chemicals and food sectors simultaneously built deep, rank and file-based, in-plant factory commissions as well as coordinated nationwide networks of unions at multinational firms. This is all the more impressive because the Brazilian industrial relations system of corporatism was designed to prevent precisely this kind of autonomous local and national worker organization. Taking the international step, linking with German, Canadian, Dutch, South African and US workers, was the next logical step for building worker organization at multinational firms. Brazilians took this rank and file unionism with them when building cross-border networks at companies such as Volkswagen, BASF, Ford and Unilever. At Gerdau this foundation of rank and file activity has been more acutely felt because Gerdau is a Brazilian firm and Brazilian unions maintain a central, home company-based role in the network. The influence of the Brazilian tradition of rank and file organization cannot be overstated in the Gerdau case.

The Canadian Steelworker Humanity Fund was also critical in the initiation and formation of early Gerdau coalition building. The Humanity Fund's emphasis on critical pedagogy, worker education, and linking hemispheric corporate globalization

with worker “globalization” dovetailed with the CNM/CUT’s rank and file-based unionism. The first international Gerdau meeting in 1998 was primarily the work of the Humanity Fund’s Judith Marshall and the CNM/CUT’s Fernando Lopes. And while this first meeting was an embryonic form of cross-border organization, it set the tone and tenor of future cross-border activity at Gerdau; internationalism would need to be rank and file based or it would never develop the capacity to exert real power at other levels.

Years of meetings primarily between the USW and CNM/CUT at both the mid and rank and file levels as well as strategic partnerships at the international, union to union level, had built strong bonds of trust between leaderships. Mid-level union officials such as USW’s Doug Niehouse and Melinda Newhouse were familiar with their counterparts on the other side of the equator, often having worked together on shared projects through the IMF, Solidarity Center and Humanity Fund (as well as working through disagreements such as the 2002 US steel tariffs) and remaining in frequent contact with each other. Even before Local 8586 was locked out, USW researchers in Pittsburgh contacted colleagues in Brazil to gather more information as it became clear Gerdau would be buying the four North Star facilities.

During the campaign, local leaders from Beaumont, Wilton and St Paul, among others, visited Brazil on a rotating basis. These US union activists met with colleagues in the CNM/CUT and Força Sindical, distributed flyers outside Gerdau facilities in industrial parks from São Paulo to Salvador, spread the word of the campaign to the Brazilian press and recounted their stories to political allies from the PT. These activists were then able to bring news of global solidarity, show photos of meetings with colleagues, and recount local actions US workers never would have been able to do. Brazilian activists who met with US workers ran front page stories in their local union newspapers and spread the word via radio programs.

Integrating worker delegations into the North American campaign partly stemmed out of this history of frequent worker exchanges before the campaign. A foundation of rank and file militancy and participation has been the *sine qua non* of USW and CNM/CUT cross-border campaigns (See Juravich and Bronfenbrenner 1995, 2003; Anner 2004; Hickey 2004). Worker delegations were central to the North American campaign partly out of the USW and the CNM/CUT's commitment to rank and file participation in campaigns in general (see Juravich and Bronfenbrenner 1999; Juravich and Bronfenbrenner 2003) as well as the repertoire of worker exchanges set during the late 1990s and 2000s. Both the union-to-union contacts as well as the rank and file exchanges were crucial. Coalition building has been the organizational principle from which all other network activities have been launched.

It is essential that the Gerdau network not lose this tradition of rank and file-based exchange. As informal networks develop into more formal structures there may be pressure to shift the levels of decisionmaking upward to higher levels of union officials at the expense of rank and file voices. While institutionalization (i.e. capacity building) is one of the keys to building long-term organization, it is crucial to maintain a balance between institutionalization and rank and file involvement. One does not preclude the development of the other, rather, one should enhance the development of the other. Worker exchanges beyond the regular GWWC meetings may act as a check on the tendency towards institutionalization without democratization.

At Gerdau this may also mean creating a more comprehensive pedagogy for union delegates who participate in GWWC meetings. As Johns (1998) pointed out, it is not enough just to have rank and file workers interact with their counterparts, these interactions must qualitatively transform workers relationships with each other in order to overcome national, gendered, and racial boundaries and create shared interests. Worker education on a local level should integrate themes of globalization

from below, building bargaining power through cross-border activity and direct worker-to-worker communication. The 2006 Gerdau Study Tour leading to the GWWC meeting is an excellent example of integrating education and action to create a praxis workers can bring back to their locals. Brazilian unionists especially have developed rich tradition of critical pedagogy. US and other Northern unions could learn from and adapt these kinds of education modules to fit their own circumstances. However an educational program may be implemented, the key is for rank and file workers to interact, both psychically and physically, with other workers to create the foundation for future collective activity.

### *Campaigns at Gerdau*

Coordinated cross-border campaign activity between Gerdau unions had not been attempted until the 2005-2007 USW campaign. This is explained most prominently by both the Gerdau network's early stages of development, and the more obvious fact that there was little reason for Brazilian unions to use cross-border strategies. Labor relations between Gerdau and Brazilian unions were relatively stable and there was little bargaining power resting outside of Brazil. Gerdau's profit centers, as evidenced by the Brazilian focus of the USW campaign, remained in Brazil. Until 2002 Gerdau only operated in Chile, Canada, Uruguay and Brazil. By 2008 Gerdau had expanded into the US, Peru, Colombia, Argentina, Mexico, Dominican Republic, and Spain. It was not until the rapid evolution of Gerdau from a major national player in the Brazilian market into an upstart steelmaker in both hemispheres around 2004 that the threat of reduced bargaining power, the need for better coordination amongst unions and crises such as the Beaumont lockout created the need for more extensive cross-border organization.

Even though the USW's campaign to end the Beaumont lockout was a defensive campaign, it played an important role in expanding the network overall. The campaign succeeded in crystallizing existing relationships between unions into a more tangible form of solidarity. The meetings in 1998 and 2003 were important steps in building a more formal framework for shared decision-making and trust building, i.e. "capacity building," but the campaign changed the tenor and focus of unions in the Gerdau network. Gerdau's blatant anti-union activity in the US was an affront to the notion, emphasized by Gerdau management, that Gerdau was a family business with a paternal relationship with its workers. Brazilian workers were especially taken aback by the stories of US workers coming to Brazil describing unsafe working conditions, concession bargaining and corporate law breaking. Brazilians were much more accustomed to being the ones who had to tell their stories to US or European workers about Northern companies operating in Brazil with anti-union tactics and disregard for labor law. This role reversal may have caused an overall shift in the way Gerdau was viewed by other unions in the network. The campaign, as well as the rank and file workers who traveled telling their stories, helped reframe Gerdau's image and created a shared threat for all Gerdau unions. Campaigns are an important process in creating a more tangible form of solidarity among workers.

Campaigns need not be vast global undertakings such as the USW campaign, but may be utilized to the extent that local circumstances dictate. The GWWC's support during Peruvian and Colombian workers' contract negotiations in 2007 was limited to letter writing and communication amongst Gerdau unions, but it sent a message to Gerdau management that Peruvian and Colombian workers were not alone (Unity Council 1/25/07). The Gerdau network will need to ensure that it works for all its members, not just for the largest unions in the US and Brazil. Through more comprehensive participation and trust building, smaller unions with less practice at

cross-border campaigns, such as the Dominican, Peruvian, and Mexican unions, may be more likely to appeal for help from other members of the network. In this case, the unions with more resources and bargaining power, such as the USW, will need to demonstrate the same levels of solidarity other unions practiced for them.

More developed forms of cross-border campaigns may also be possible as the Gerdau network develops over time. Thus far cross-border campaigns at Gerdau have been primarily defensive. In the US, Gerdau Ameristeel's operations remain nearly half non-union. The USW could make a concerted effort to organize these plants using the network as a central part of its organizing strategy. Cross-border organizing efforts at other companies have been scattershot at best, but with the levels of trust and infrastructure of communication between Gerdau unions, a well-planned, strategic cross-border organizing campaign may be more feasible.

### *Capacity Building at Gerdau*

Establishing the GWWC in November 2006 was the most important step towards formalizing existing relationships and building continuity for future collaboration. The GWWC is the forum for sharing decisionmaking responsibilities, airing grievances, and speaking with a unified voice to those outside the network, especially Gerdau management.

In the Gerdau case, the GWWC is the culmination of years of more informal relationships. This lengthy history of collaboration is somewhat unusual compared with other networks. In other cases, at other companies, a rich history of collaboration and activity between unions may not exist as it had at Gerdau. This should not be a barrier to establishing more formal spaces for decisionmaking, as long as this establishment of a more formal space is combined with activities such as coalition building and campaign solidarity. Establishing world councils such as the GWWC at



other companies will only provide real spaces for voice and continuity if they work in concert with other activities. World councils such as the GWWC are only as dynamic and strong as the relationships between their members.

Research has played an important role in the institutionalization of the Gerdau network. One of the original goals of the GWWC was the creation of a shared research database accessible to all unions in the network. This database collects information on the location and size of each Gerdau facility, wages, working conditions, health and safety issues, and levels of union representation by plant and country. Organizing and codifying this information creates a more comprehensive understanding of Gerdau's global operations and, potentially, provides a blueprint for more sophisticated bargaining, organizing, and representation campaigns. The USW, CNM/CUT, DIEESE, and the IMF all have well developed research capabilities. These unions will need to maintain their commitment to communication and information sharing.

Involvement by GUFs is important in this step of formalization and continuity. The IMF's participation in the 2003 Gerdau workers' meetings in Rio de Janeiro was an important step for the global committee's overall development. Though the IMF's official recognition of the GWWC as a global representative body for Gerdau workers wouldn't happen until 2006, the IMF's 2003 participation signified that there was sufficient interest in solidifying the existing network and that these unions were willing to commit resources and manpower for future expansion of the network. The IMF is an important source of funding, resources, and coordination because it maintains a stable global presence in most regions of the world. If Gerdau expands to new countries where the USW or CNM/CUT don't have relationships with unions, the IMF is able to initiate contacts and link the network to these new unions.

Future GWWC work may involve building more regional networks: North American, Andean, Southern Cone, and Brazilian. The North American Unity council

and the Brazilian Gerdau Network already provide models for these kinds of regional networks, but more work will need to be done to include others, especially unions in countries with fewer workers such as Peru and Mexico, into networks which represent their interests more directly. Other global networks such as the BASF network have adopted this regional sub-structure to coordinate communication and action as these networks have grown to include more members.

Other possibilities for more decentralized governance might come from the formation of issue related committees: education, organizing, health and safety, etc. Because of its more universal, cross-national application, the GWWC has already identified health and safety as a future area for collaboration. The May 2007 GWWC meetings in Montevideo focused specifically on building a platform for research and collaboration on health and safety issues. Similar GWWC meetings could focus on creating a global education curriculum, or a study on possible joint organizing and bargaining campaigns.

In whatever form the GWWC develops, it will need to maintain an open and inclusive structure where all members, not just the larger members, have a voice. Thus far this balance between North and South, large and small, has been a pillar of the GWWC's success, but as Gerdau continues to grow, this will need to remain central. Likewise, the GWWC must remain a space for rank and file voice, not just an echo chamber for the prerogatives of official union representatives. Again, thus far the GWWC has been an excellent example of this, but it will need to remain a central organizing tenet of the GWWC's work.

### *Contracts at Gerdau*

The issue of an IFA at Gerdau may be the most long-term and difficult goal for the network to achieve. Most of the IFAs signed have been at European-based MNCs

where stronger institutional supports such as national works councils or EU-wide EWCs promoting firm-level bargaining exist. As of 2007, forty-eight of the fifty-five IFAs signed have been with European MNCs; only two, Turner and Chiquita, have been with US companies (Stavis and Boswell 2008). No IFAs have been signed by companies based in the Global South.

Nonetheless, an IFA remains an important goal for the Gerdau network. First, it provides a concrete goal to organize cross-border activity. Long-term network collaboration requires some degree of shared future goals in order to maintain a cohesive agenda for cross-border activity. Second, an IFA would provide some form of institutional opening for dialogue with Gerdau management on a global level. This transnational space for dialogue with Gerdau management in Porto Alegre could obviate the kind of costly and enervating campaign the USW was forced to use during its 2005-2007 campaign. Third, an IFA at Gerdau would be even more meaningful to other union networks beyond Gerdau because it would be the product of a more organic, grass roots model of global unionism rather than one emerging from strong institutional supports. An IFA would be a symbol that unions would not have to rely on the institutional supports of an EWC or strong national industrial relations system as the foundation for developing cross-border unions.

IFAs are important achievements, but most lack enforcement and monitoring mechanisms. Enforcement of IFA provisions must come primarily from the bargaining power of the unions themselves. An IFA provides one more tool to build bargaining power, but it is not the pinnacle of cross-border unionism. Unions must have bargaining power on the local, national and international levels in order to hold companies to their side of the agreement rather than rely on an IFA to automatically provide bargaining power to unions. Enforcing an IFA will be easier in places where unions have greater bargaining power, or stronger labor law provisions. In countries or

regions where there is less bargaining power and/or little institutional support for labor law enforcement, an IFA will have less impact. But, as an IFA is designed to provide basic rights for all employees of the company (and those of subcontracted workers), networks must take a comprehensive approach to building bargaining power for all network actors. This is why it is important to build the bargaining power of the network as a whole, not just focus on signing an IFA in itself. An IFA without bargaining power to support and enforce it will be of little value, but an IFA with strong network actors is potentially a powerful tool for enforcing the rights of all workers at the company.

Successful examples do exist for the Gerdau network to emulate. The *Coordinadora Latinoamericana de Sindicatos Bananeros* (COLSIBA) have built a grass roots organization of primarily women banana workers from Central and South America. COLSIBA succeeded in signing an IFA with Chiquita in 2001 (Frank 2005), the first of its kind in the agriculture sector. Since 1985 this network has developed through cross-border campaigns, education, and organization, with an emphasis on women's issues (an issue that has not come up at Gerdau). COLSIBA has used its broad network leverage to push for stronger regulatory and monitoring programs beyond the IFA itself (Frundt 2007). At COLSIBA an IFA, coupled with broad grass roots support and an aggressive approach to defending workers rights, has become an important tool for more comprehensive cross-border activity, not simply an end in itself. Collaboration and exchanges between Gerdau workers and the COLSIBA unions could be a powerful tool for coming up with new Gerdau network strategies, especially strategies to push for an IFA.

## *Global Unions/ Cross-Border Networks*

The focus of this thesis has been on the global network as a subject, not simply as a supporting actor in other union activities, particularly cross-border campaigns. I argue that networks do not construct themselves, nor can unions take them for granted. Rather networks must be developed and utilized by unions in order to keep them sharp and effective. A comprehensive program of coalitions, campaigns, capacity building, and contracts should be central to both building networks and analyzing their effectiveness. Individual networks vary considerably in their respective organizational forms and levels of development, but more work needs to be done by scholars and practitioners to assess the effectiveness of various tactics and strategies.

The notable exceptions to this are research devoted to the dockworkers global network (Anner et al 2006; Turnbull 2007), US-Mexico cross-border organizing efforts in the *maquila* sector (Alexander and Gilmore 1999; Hathaway 2000; Frundt 2002), and the networks formed by the banana workers in Central and South America (Frank 2005; Frundt 2007). This paucity may be representative of the difficulties in developing and *maintaining* cross-border union networks. The paucity becomes clearer when looking at the disparity between the large amount of research on individual campaigns versus the lack of research on successful, sustained forms of cross-border representation. More work is needed to compare similarities and differences in these findings and possibilities for future research.

This thesis is an important addition to the case studies documenting the USW's international strategies. It is also the only one that this author knows about to examine the possibilities of long-term, cross-border organization in this context. Further research might take the compiled case studies of USW cross-border campaigns and apply my framework of coalitions, campaigns, capacity and contracts to them. Bridgestone/Firestone would be notable considering the development of the

Bridgestone/Firestone global network and regional networks after the campaign wrapped up. The Latin American United Tire and Rubber Industry Workers (FUTINAL) has become an important forum for regional coordination of unions in the tire and rubber industry. FUTINAL involves over twenty-five unions as well as the ICEM meeting regularly to exchange information and strategy (Steelabor 2001). BASF would also be an interesting example because a dense network of unions has developed in Latin America, Asia and Europe, but has not included North American BASF workers. This is especially interesting given the 1984-1990 BASF campaign in Louisiana which used international solidarity as a central tactic in ending the lockout (Minchin 2003). More research is needed to see how this network has been utilized in other cross-border solidarity campaigns such as Continental Tire, Titan Tire and Goodyear Tire.

### *Other Network Actors*

#### *National Networks*

This study also examines the initial formation of the global network as well as its ancillary national-level networks. These national networks are important for multiple reasons. First, in large countries such as the US and Brazil where there are multiple unionized facilities (thirteen in the US and more than a dozen in Brazil) with individual contracts (especially when these facilities are geographically dispersed) there is a need to establish some formal network of communication and regular meeting to share information and coordinate common bargaining strategies. Second, these national networks dovetail with the cross-border work of the GWWC. International meetings are prohibitively expensive and lack of funds limit the number of local unionists who may participate in international meetings. National networks ensure that subjects covered, resolutions passed, and information shared at the global

level are disseminated back to the national and local level. Conversely they also serve to disseminate information and to communicate issues relevant to local unions upward to the global level.

The cross-border network at Gerdau was an outgrowth of the strategies of building a national network of Gerdau unions in Brazil. Because the Brazilian industrial relations system confines official trade union structures to the municipal level and segments unions by industry and sector, unions have had to create autonomous and parallel structures in order to coordinate activity across firms and geographically across the nation. The CNM/CUT undertook a policy of building firm-centered networks at multinational firms operating in Brazil in the 1980s and 1990s. Unions have been most successful in organizing in the auto, chemicals and heavy industry sectors. This program has evolved into a more methodical program of building networks at multinationals (see CUTMulti 2008) and has expanded its reach to building cross-border networks. The Gerdau example is somewhat unique in this respect (especially in the 1980s when there were few Brazilian multinationals) as it is a Brazilian and not a North American or Western European firm.

National networks are important in their own right, not just as building blocks in cross-border networks. This is evidenced by the formative work of the North American Unity Council (formerly the North Star Unity Council) during their campaign to align contract expiration dates. The work of meetings, establishing trust, sharing common issues and overcoming grievances during this domestic campaign translated into a shared repertoire of activism and built lines of communication which would be utilized during the global campaign. As Gerdau expands and purchases new facilities, some of which are unionized, these union members may quickly be involved in the work of the network. The Unity Council continues to meet regularly, publish a newsletter and coordinate North American strategies.

### *Global Union Federations (GUFs)*

While Global Union Federations (and their predecessors, International Trade Secretariats before them) have been criticized in some quarters for ineffectiveness (Jakobsen 2001) GUFs have become more proactive in their involvement in cross-border campaigns (see Snyder 2008). GUFs provide important resources to both the maintenance of global networks as well as to their expansion. First, GUFs provide financial, logistical and institutional support. Research tools, planning and executing international meetings, and translation (sometimes across three or more languages) cost large sums of money. Maintenance of websites, conference calls and (multilingual) newsletters are all time consuming and require devoted staff as well as developed networks of communication between parties.

Second, globalization demands that unions develop more flexible means of coordination and GUFs play a crucial role in initiating contact between unions in new countries and regions. As corporations expand production networks beyond their established bases in Western Europe and North America or expand along commodity chains, unions need to expand their network of allies. Many unions are unfamiliar with cross-border work. GUFs have established offices and project staff in most regions across the globe. Few unions have the global infrastructure or capacity that GUFs have. Whatever the criticisms of GUFs for their ineffectiveness or structural defects they remain the only truly viable global labor organizations with the capacity to aid complex cross-border campaigns as well as ensure some form of continuity.

Third, the rise of International Framework Agreements as both a tool for aiding cross-border campaigns and a long-term organizational goal have thrust GUFs into a more prominent role *vis a vis* cross-border networks and campaigns. While only fifty-five IFAs have been signed and the reality of a signed and working IFA remains out of reach for most workers represented at multinationals, IFAs remain an important



benchmark of global union organization. GUFs have been signatories of all IFAs and remain at the center of negotiations with corporations once IFAs have been signed. It follows that GUFs would play a central role in facilitating cross-border networks throughout their gestation and not just once an IFA has already been signed.

The Gerdau network was formed “informally” in the sense that the 1998 meeting in Charqueadas was an initiative of the USW Humanity Fund through its work with the CNM/CUT. Exchanges, meetings and cooperation around hemispheric trade deals such as the FTAA kept USW/CNM/CUT relationships active and communication open, but the network did not qualitatively expand until after the IMF became involved in 2003. As Gerdau expanded into Argentina, Colombia, and across the US, coordination became more complex and required more resources. The Steelworker Humanity Fund was integral in the initial meetings with the Brazilians and Chileans, but a more global network needed a more centralized organizer to coordinate the growing number of unions scattered across Latin America. In order to handle the complications and logistics of expanding the Gerdau network it was natural that the IMF would take a more central role in coordinating the various unions.

GUFs are not a panacea to the questions of global unionism. They are not designed to run campaigns on a local level or set the agenda for local unions, but rather to coordinate local and national struggles by maintaining global channels of communication and coordination. While GUFs are understaffed and underfunded, they do provide an important role in building and facilitating cross-border networks and campaigns. They have the reach and capability to initiate new contacts between unions in unfamiliar regions. GUFs also have the know-how to build cross-border networks and conduct campaigns. Most GUF staff are former union activists themselves and have run global comprehensive campaigns in their home unions. These staff campaigners bring with them a broad network of allies in unions and NGOs as well as

a proven repertoire of tactics and strategies tested in various circumstances. In the future GUFs will need to be important players in building cross-border networks and conducting global campaigns.

### *Bridgebuilders*

Special note needs to be made of the role of “bridgebuilders,” both in building the Gerdau network as well as in conducting the North American campaign.

Bridgebuilders are often overlooked in institutional analyses because they tend to be individuals, not institutions, and their utility cannot be summed up simply by their membership in one organization. By their nature they occupy a role that goes beyond the organization they represent. Tattersall and Rose discuss bridgebuilders in the social movement context as “people with experience in community organizations and unions who translate cultural differences between organizations” (Tattersall 2007: 157; Rose 2000). Robertson and Plaiyoowong (2004) give a more germane definition with their analogy of “mid-fielders.” “The presence of a bi-lingual and knowledgeable ‘mid-fielder’ who plays the key linking role with both the defensive and offensive side of the football team. In the case of an international labour solidarity effort the mid-fielder is involved in both the national and international sides of the effort” (Robertson and Plaiyoowong 2004: 5).

It is difficult to build a model that presupposes or guarantees the presence of a bridgebuilder. “Bridgebuilder” is not a job title and one can’t hire a bridgebuilder the way one can a researcher. Bridgebuilders tend to emerge organically from the specific context of a campaign. Researchers may have in-depth knowledge of how a corporation is structured and where it is vulnerable to pressure, but may not know who to contact or work with to implement an action plan. Organizers may be skilled at organizing actions and may know a group of workers inside and out, but without

knowing the cultural and political contexts of another country or union, an organizer will not be able to effectively run a global campaign.

In the Gerdau case there was continuity in these bridgebuilders. Lopes' legacy as a former Gerdau worker,<sup>8</sup> and a local and then national union activist who helped form the Gerdau network from the outset gave the Gerdau campaign an auspicious boost. For Lopes, the campaign was a logical extension of the effort he had put into building the network from the beginning. But Lopes' importance goes beyond the emotional or personal stake he brought to the campaign. Carolyn Kazdin, while officially hired by the USW after the North American campaign began, had been familiar with both the USW and CNM/CUT for years. Kazdin had participated in the Second International Gerdau meeting as the AFL-CIO Solidarity Center's Brazil representative, and had remained in contact with activists in the Brazilian labor movement. When she was hired by the USW in a full time capacity in 2005 she was able to transition directly into aiding the Gerdau campaign without having to rebuild or reestablish trust.

Other important bridgebuilders on both sides of the equator contributed significant pieces to both the campaign and the network. Judith Marshall, director of the Steelworker Humanity Fund, was the central figure in the establishment of the Gerdau network on the northern side. Jorge Garcia-Orgales continues to be involved in research and organizing of the Gerdau network as well as others that involve Canadian USW members.

Despite criticism for its Cold War-era work in other parts of Latin America and the Global South, the AFL-CIO's Solidarity Center has maintained a steady presence in Brazil. Carolyn Kazdin's tenure at the Solidarity Center translated directly into her

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<sup>8</sup> As per the Brazilian labor system Lopes is still officially employed by Gerdau though he receives no pay and has not worked in a Gerdau facility for over 20 years.

ability to slide into her new role with the USW during the Gerdau campaign. Terri Lapinsky facilitated early exchanges of Gerdau workers in Brazil and aided USW with worker tours and logistics until her departure in 2007. Current Brazil field representative Brian Finnegan, formerly the Solidarity Center representative for the Southern Cone, has taken a lead role in organizing and facilitating regional and international meetings of the GWWC. Each of these has acted as bridgebuilders mediating between Northern and Southern unionists. Their full time presence in Brazil and Latin America sends the message that one campaign is not isolated, and that solidarity is reciprocal. This continuity is important in maintaining lasting channels of trust and communication that work both, North to South and South to North. Bridgebuilders have been the focus of multiple articles in social movement literature, but have remained an under-researched phenomenon, especially in cross-border union literature.

### *Challenges to the Model*

The Gerdau campaign and cross-border network present many lessons for both practitioners and researchers, but it is not a complete model. The Gerdau case has room for improvement and expansion. Education and global pedagogy is an area for development of the Gerdau network. This question of pedagogy, education and creation of the space for cross-border exchange may be the most important issue for the long-term vitality, not just the continuity, of the Gerdau network. The Gerdau network was initiated by an initiative from the Steelworker Humanity Fund, an organization which has consistently placed worker education and exchanges at the center of its mission. As the Gerdau network shifted from a Humanity Fund project to a more concentrated USW project, the focus on education and pedagogy has

diminished. This may be partly due to lack of resources and focus at the USW international as well as the urgency created by the North American campaign.

First, the USW will need to devote more resources to creating a pedagogy around globalization for local union members. The process of “making members internationalists” does not happen automatically and unions cannot rely upon crises, such as the North American campaign, to radicalize or globalize its members. In order for bargaining power to be truly expanded, Gerdau management must be constantly reminded, on a plant-by-plant basis, that local members are connected to global networks of power and that these networks are available to be used. Through button and t-shirt days, worker exchanges, study sessions, and global solidarity funds, local unions must make transform these global networks into local bargaining power.

This pedagogy would ensure that members see cross-border strategies as an option when looking for creative solutions to collective bargaining issues. A commitment to worker education about globalization would also combat the tendency in some media to portray foreign workers as competition rather than as sources of solidarity. An analysis of the broader Gerdau project must take into account the shift from the early focus on worker education by the Steelworker Humanity Fund to a more organizational approach to developing the GWWC. Pedagogy and education cannot be sacrificed for the larger goals of building more stable cross-border organization from the top down.

Second, because Gerdau is a multinational steel producer it is embedded in a global production chain that includes miners and transport workers downstream and construction workers upstream. Miners and workers in extractive industries have been involved in global production chain organizing at Rio Tinto, Vale Rio Doce and others. These networks have grown to include environmental activists in the producing country and the consuming countries. Dockers and transport workers have also been

involved in global organizing efforts. Expanding the Gerdau network to include these sectors could increase the bargaining power of Gerdau workers globally by producing more sites of potential leverage in the case of a strike, lock out or global organizing campaign.

The third potential site for expansion of the network would be to use the network in a global organizing campaign. While most production facilities outside of the United States are already organized, Gerdau remains nearly fifty percent unorganized in the US. The USW has shown itself to be adroit at using global strategies during bargaining campaigns, yet it has shown a reluctance to use this potential leverage in organizing campaigns. Most union have been hesitant to integrate global solidarity into their organizing campaigns, despite UNITE's 2001-2003 campaign at Brylane (Hannah 2006) and 2004-2005 campaign at H&M which demonstrated that global solidarity could be an important component. The Gerdau case is ultimately a defensive case. A concerted and well-planned effort to organize workers in the US with the aid of the cross-border network could be an example for other USW networks and a riposte to critics who claim that industrial workers cannot be organized in the current economic context. Without a comprehensive strategy to organize non-union Gerdau facilities in North America, gains made through cross-border campaigns and collective bargaining are likely to be threatened by whipsawing and non-union competition.

## **VI. Conclusions**

This thesis has examined the development of a cross-border union network at the multinational steel firm, Gerdau. The Gerdau case study provides a rich source of information for examining the dynamics of cross-border union activity and organization. The Gerdau network has lasted more than ten years and continues to

meet and coordinate activity. Unlike other cases of cross-border coordination, the Gerdau network has withstood many tests to its very existence and yet, in spite of these challenges, the network has thrived. It is this perseverance and continuity of organization that is at the heart of this case study. What factors, both internal and external, have led the Gerdau story to be one of success while so many other attempts at cross-border union coordination have failed to sustain themselves beyond initial cooperation? Does the Gerdau network provide a model for other unions to build long-term, cross-border organization? If so, what are the keys to replicating such a model? I believe the Gerdau network does hold important lessons for other unions, though applying these lessons in other contexts may be more of an art than a science.

First, the Gerdau network has been built on a foundation of rank and file involvement. From the first meetings between Brazilian, Chilean and Canadian trade unionists in 1998 to more formal iterations of the Gerdau network, such as the GWWC, rank and file members have been central to cross-border strategy. What is key, and overlooked by most studies, is not just what happened during the cross-border exchanges and delegations themselves, but what happened when these workers returned to their workplaces and union locals. Internationalism became more than just something that occurred overseas; rather, internationalism was brought back with workers and able to slowly take root in the locals in Brazil, Canada, and the US. This ensured that the seeds of shared interests and common goals were planted among the rank and file base at Gerdau. Workers delegations gave solidarity a face, not just during the meetings of 1998, 2003 and during the 2006 Gerdau Study Tour, but especially during the 2005-2007 global campaign when US workers told their stories of poor working conditions and management intimidation directly to Brazilian unionists unfamiliar with that side of Gerdau. Unions at Gerdau will need to ensure

that this legacy of rank and file involvement remains the foundation of future cross-border collaboration.

Rank and file involvement in cross-border activities built deep bonds of trust, and in doing so laid the foundation for more complex cross-border activity such as the 2005-2007 global campaign. That campaign occupies a central role in this case study not just because of the strength and endurance of the workers involved, but for the level of coordination the three-year campaign took to complete. The campaign was a tangible expression of solidarity and coordinated activity on an unprecedented level at Gerdau. North and South American unions had met and exchanged information prior to the campaign, but the campaign demonstrated that unions at Gerdau had a sufficient level of comfort and familiarity with each others' tactics and an ample reserve of trust that unions could coordinate a cross-border campaign with actions taking place in multiple countries simultaneously. Granted, the campaign was spearheaded by the USW, who had run similar types of campaigns before, but not at Gerdau. The USW could not have maintained the level of pressure on Gerdau management in its most vulnerable area, Brazil, without a history of trust and a network of unions ready to do actions on the ground on behalf of the USW. Unions at Gerdau will need to make sure that calls for global solidarity are reciprocated, especially when those calls come from smaller unions with fewer resources. It will also be important for unions at Gerdau to find ways of building cross-border campaigns to expand, rather than just defend, levels of bargaining power.

Third, the establishment of the GWWC in 2006 may be the single most important event, in the more than ten-year case of the Gerdau network. The GWWC is key because it demonstrated a level of structural and organizational maturity that most cross-border union networks lack. The GWWC is a formal body for regular meetings, shared decision-making, and the resolution of differences between unions. It implies a



commitment to future activity, rather than organization for a single event. There have been numerous cases of individual cross-border campaigns and cycles of worker exchanges between unions at other multinational firms, but only a scant handful of unions have been able to maintain organizational continuity and vitality, especially without the structural scaffolding of a transnational regulatory framework such as the European Works Councils system. With the benefits of more developed levels of coordination comes a responsibility to involve all Gerdaun unions, not just the largest unions, in the decision-making process. Unions will need to make sure that the voices of all unions at Gerdaun are heard, and likewise that the GWWC represents the interests of all its members.

Finally, the issue of an IFA may be the most difficult challenge facing the Gerdaun network as a whole. An IFA undoubtedly remains an important long-term goal for the network and, if achieved, would give the network an established level of recognition from Gerdaun management and ensure a broad framework of rights for all unions at Gerdaun. But an IFA is not a panacea for Gerdaun unions; IFAs are only as strong as the unions who use them. Nonetheless, an IFA remains a central, long-term organizing frame for cross-border activity, even if the realization of that goal continues to be seemingly far off. If it were to be achieved by unions at Gerdaun, it would be one of the first IFAs to come from a bottom-up campaign at a non-Western MNC, a historic feat.

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