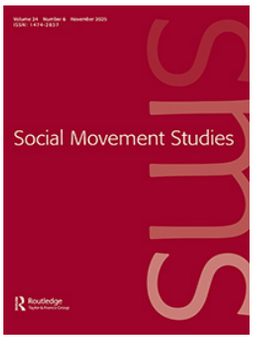

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A threat to protest as a winning strategy for the labour movement: long-term experience from Sweden

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ABSTRACT

This article examines the strategic role of strike threats in advancing labour movement objectives, using a novel dataset of union-employer disputes in Sweden from 1980 to 2023. While strikes have long been central to labour mobilisation, we focus on the underexplored power of strike threats – instances where industrial action is announced but not executed. We theorise that their effectiveness depends on three factors: union characteristics that shape both the perceived credibility of the threat and the anticipated costs of conflict, target characteristics, and institutional context, which shapes both disruption costs and the target vulnerability. Using notices of industrial action – formal announcements of strikes – as proxies for protest threats, and treating non-execution as a marker of union success, we analyse how union capacity (measured through union density), inter-union coalitions, and employers' vulnerability to work stoppages shape outcomes. Our findings show that only one-third of disputes involving strike threats result in actual strikes; in the remainder, unions secure concessions without resorting to industrial action. The effectiveness of strike threats has increased over time, particularly following institutional reforms that incentivise negotiated settlements. Surprisingly, higher union density correlates with a lower likelihood of winning through threats alone. Our findings highlight the strategic potential of non-executed protest threats and call for greater attention to their role within labour and social movement research. By examining how institutional and organisational contexts condition protest outcomes, the study contributes to broader debates on contentious politics and the evolving repertoire of labour mobilisation.

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Introduction

Strikes have always been central to working-class struggles for higher wages and improved working conditions (Franzosi, 1989; Cohn, 1993; Ragin et al., 1982; Wilmers, 2017; van der; Velden et al., 2007; Vandaele, 2011). Strikes are a fundamental source of power for trade unions: by collectively laying down work,

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workers can exert direct pressure on employers to advance their demands. As Cohn (1993), p. 1) succinctly put it, 'Employers never cede anything unless subjected to overt pressure.' Yet, despite their historical importance, the number of work stoppages has declined markedly across post-industrial societies (Gumbrell mccormick & Hyman, 2014; Velden et al., 2007). This trend is often attributed to the weakening of organised labour: with fewer members, unions cannot exert sufficient pressure on employers to make strikes a viable means of conflict. However, strikes have decreased even in countries with comparatively high union density, such as Sweden, suggesting that union strength alone is insufficient to explain the pattern. Does this imply that unions have abandoned their primary strategy of pressure? Or does the decline in strikes suggest that unions now influence employers through alternative means, such as the *mere threat of striking*?

While scholars of social movements have examined the economic outcomes of protests (P. D. Almeida, 2018, King & Pearce, 2010; Giugni & Grasso, 2019), and economists have analysed strike dynamics in relation to collective bargaining (Crampton & Tracy, 2003; Kiander, 1991), comparatively little attention has been paid to the effects of strike threats within labour struggles. The few existing studies that address this question have employed indirect measures of strike threats and focused primarily on the United States (Dixon, 2010; A. Martin, 2010; A. W. Martin & Dixon, 2010). In contrast, research using more precise measures of strike threats has largely examined general strikes and their political consequences. For example, in a study of general strike threats in Western Europe between 1980 and 2009, Hamann et al. (2013) found that concessions were more likely when multiple unions coordinated their efforts and when a coalition government was in office. Their findings suggest that the outcomes of strike threats depend on union characteristics, strategic coordination and the political context of the conflict. In a rare case study of strike threats in California, Ovetz (2020) demonstrated that in the context involving largely non-unionised workers, the effect of a threat depends on its perceived credibility by both other workers and employers. However, it remains unclear whether strike threats yield concessions to unionised workers in more routine settings such as collective bargaining.

This article addresses this research gap. Following recent efforts to apply social movement theories to the study of labour mobilisation (Kelly, 2005; Vandenberg, 2006; Zajak et al., 2018), we build on prior research in industrial relations and on the political and economic outcomes of social movement mobilisation (Bosi et al., 2016; Giugni & Grasso, 2019). Specifically, we investigate which types of unions, and under what conditions, are most likely to secure concessions from employers through the mere threat of a strike. Drawing on Luders (2006) framework of protest-related disruption and concession costs, we argue that the *resources* available to activists (unions) and the *vulnerability* of their targets (employers) are central to shaping the latter's willingness to make concessions and avoid the potential costs of a strike. The persuasive power of labour movements thus hinges on factors that enhance both the credibility of their threats and the anticipated costs of disruption, alongside the perceived costs of meeting union demands. Building on industrial relations research (Hicks, 1963; Piazza, 2005; Crouch, 2017), we link these cost assessments to union characteristics such as union density and cooperation, as well as to broader institutional developments (e.g., labour legislation) and economic conditions that affect employer vulnerability.

Empirically, we focus on labour struggles in Sweden from 1980 to 2023. In contrast to prior studies that rely on approximate indicators, we use a unique, precise, and comprehensive measure: all formal notices of industrial action submitted by Swedish trade unions and archived in the National Archives. As in most countries, Swedish unions are legally required to notify employers in advance of initiating a strike, with a mandatory notice period of at least seven days. These notices not only inform employers and authorities of the breakdown in negotiations but also function as explicit threats of industrial action. Importantly, they establish a time frame within which the labour market parties can continue negotiations and potentially reach an agreement before the planned industrial action takes effect. By linking data on strike notices and actual strike activity to detailed information about the characteristics of the unions involved, as well as the institutional and sectoral contexts, we can systematically examine the conditions under which strike threats succeed without being executed. This approach enables a nuanced analysis of when strike threats alone lead to concessions, and under what conditions – and for which types of unions – they prove insufficient.

The structure of the article is as follows. We begin with a brief introduction to the Swedish case, outlining its system of collective bargaining. The second section reviews existing literature on strike outcomes and develops the theoretical framework for our study, linking industrial relations research with scholarship on social movement outcomes. The third section presents the data and describes the variables used in the logistic regression analysis. Finally, we discuss the findings and reflect on the implications for understanding protest power within contemporary labour movements.

The case of Sweden

Although Swedish industrial relations have undergone change during the past forty years, they continue to be characterised by a high degree of coordination and a comparatively strong labour movement (Baccaro & Howell, 2017). Approximately 80 unique trade unions have existed during the study period (1980–2023), although mergers have reduced this number to around 50 today (Medlingsinstitutet, 2024). Union density has declined from an exceptionally high 80% in the 1990s (Kjellberg, 2019) to roughly 70% in recent years (Medlingsinstitutet, 2021). Nonetheless, Sweden remains among the countries with the highest union density globally. Collective agreement coverage remains extensive, encompassing about 90% of the workforce: 100% in the public sector and around 80% in the private sector.

The Swedish wage bargaining system was centralised until 1983, with peak-level confederations responsible for wage bargaining. In 1983, the Swedish Engineering Employers' Association successfully persuaded the Metal Workers' Union to negotiate separate agreements, leading to the dismantling of the centralised system and a shift toward sectoral bargaining. The wage bargaining rounds that followed the exit of the metal industry were marked by increased industrial action. In the early 1990s, during the severe economic crisis, the Swedish government intervened in the wage bargaining process through what became known as the 'Rehnberg' agreements (1991–1993). Such state intervention in labour market issues is rare in Sweden. Concurrently, the government raised penalties for wildcat strikes (Jansson & Uba, 2023). Employers used the

recession to push for decentralisation of wage bargaining, especially in the private sector. The attempt partly failed.[1]

The wage bargaining rounds in 1993 and 1995 were marked by significant conflict, including numerous strikes and lockouts. Eventually, unions and the employers' organisations in the export sector reached an agreement in 1997 to coordinate wage bargaining at the sectoral level. This 'Industrial Agreement' introduced a formal institutional framework for wage bargaining, including a predefined time – schedule for wage bargaining: renegotiations of collective agreements must begin three months prior to the expiry of existing agreements (Elvander, 2002). As 'peace obligation' applies once a collective agreement is in force, and a three-month negotiation period is relatively long, levels of industrial action decreased rapidly after 1997. The agreement also led to a 're-coordination' of wage bargaining between sectors. Once the industrial sector agreed on wage increases (setting the 'mark'), other sectors were expected to follow suit – preventing the sheltered sectors from driving wage growth (and inflation). Concerned by the wave of industrial actions in the 1990s, the Swedish government reinforced this process by establishing the National Mediation Office (NMO) in 2000. The NMO was granted the authority to promote an 'efficient wage formation process' through ensuring that other sectors adhered to the wage norms set by the export sector.

Following the Industrial Agreement, the annual average number of official strikes halved – from 10 to 5—and the number of working days lost due to official strikes decreased fourfold (Jansson & Uba, 2023). These relatively low figures must be understood in light of Sweden's extensive scope of collective bargaining, with approximately 600 collective agreements currently in force that regulate wages and employment conditions, covering 90% of all employees. Wage bargaining in Sweden is relatively coordinated: most sectors operate with agreements of similar duration and therefore renegotiate them in the same year, during so-called 'wage bargaining rounds.' In such years, roughly 500 collective agreements are typically renegotiated, creating numerous opportunities for disagreement, dispute, and industrial action. As such, wage bargaining rounds provide a valuable context for analysing the varying effectiveness of strike threats.

Outcomes of unions' mobilisation in the literature

Although the nature and trajectory of industrial conflict have evolved (Godard, 2011; Hamann et al., 2013; Perra & Pilati, 2023), most strikes still take place within the framework of collective bargaining. These actions remain a key tool through which the labour movement can demand change, empower workers, and signal the urgency of issues related to wages, working conditions, and other employment matters. In some respects, strikes during the wage bargaining process resemble protests mobilised by other social movements. However, they typically occur within the routine operations of trade unions, in contexts that are highly institutionalised. Typically, unions have already secured the recognition from their opponents as legitimate representatives of workers' interests – what Gamson (1990), p. 29) described as the acceptance of a movement as a 'valid spokesman for a legitimate set of interests.' While some scholars portray social movements as relatively limited in their ability to drive significant social change via protests (Giugni, 2007), the labour movement is frequently regarded as an exception –

particularly in relation to its influence on welfare and social policy (e.g. Béland, 2001; Engeman, 2021).

However, the outcomes of unions' day-to-day struggles – particularly efforts to secure wage increases for their members – remain less well understood. Some studies suggest that strikes, especially their duration, are not significantly associated with wage gains (Card, 1990; Vroman, 1984), while others find only marginal positive effects (Stengos & Swidinsky, 1990) or even negative outcomes (Jiménez-Martin, 1999; Jiménez-Martin, 2006). A recent longitudinal study of strikes in the US found that, since the 1980s, strikes have not led to increases in wages or other benefits (Massenkoff & Wilmers, 2024). These mixed findings suggest that broader institutional and economic conditions shape strike outcomes. The structure of collective bargaining systems and macroeconomic factors – such as unemployment levels – are likely to influence both strike mobilisation and its outcomes (Addison & Teixeira, 2024; Crampton & Tracy, 2003).

Other scholars emphasise the importance of union membership and trade union density in shaping strike outcomes. Unions' bargaining power is linked to their ability to pose a 'credible threat of strike' (Ashenfelter & Johnson, 1969; Cohn, 1993; Hicks, 1963; Korpi & Shalev, 1979), which is strongly correlated with membership strength (Kaufman, 1982). A substantial membership base thus constitutes the union's most important 'power resource', enabling it to orchestrate large-scale industrial action capable of exerting significant pressure on employers (Korpi & Shalev, 1979). A union's organisational capacity is typically assessed through its membership size or via trade union density – the proportion of unionised workers within the total workforce (Kelly, 2015). A recent study using European company-level data found that higher union density correlates with a greater likelihood of the union winning the labour dispute (Addison & Teixeira, 2024). These findings align with research on the economic outcomes of social movements, which similarly highlights the importance of movement resources, target vulnerabilities, and contextual factors in shaping success (see King & Pearce, 2010; Giugni & Grasso, 2019 for reviews).

Although strikes remain one of the most powerful tools available to unions in the collective bargaining process, they also impose substantial costs, including the need for strike funds, internal discipline, and sustained member mobilisation. As a result, unions may prefer to issue strike threats rather than carry out actual industrial action. Strike threats can also serve internal functions by channelling worker dissatisfaction and reinforcing organisational legitimacy (Ashenfelter & Johnson, 1969). Thus, while issuing a strike threat may appear to be a broadly advantageous strategy, its effectiveness is unlikely to be uniform across time and space. Recognising that the outcomes of strikes and strike threats are analytically distinct, we examine the conditions under which strike threats are more or less likely to succeed.

What explains the effectiveness of strike threats?

We argue that the mechanism through which strike threats generate concessions resembles the broader processes by which social movements achieve political or economic change (for reviews, see Amenta et al., 2010; Bosi et al., 2015). According to social movement research, authorities tend to make concessions to activists to 'prevent a shift from routine politics to massive protests' (Béland & Marier, 2006, p. 379). Protest targets – particularly economic ones – are more likely to concede when the anticipated

costs of disruptions from mobilisation are perceived to outweigh the costs of meeting demands (Luders, 2006; King & Pearce, 2010). Similarly, Wahlström and Peterson (2006) argue that 'perceived threats to current or anticipated profits must be central to explanations of [protest] accommodation or intransigence' (p. 966). Still, existing research provides limited theoretical guidance for identifying the conditions under which *protest threats* are likely to succeed. A notable exception is Vüllers and Schwarz's (2019) study of protest threats in Nepal, which finds that threats issued by trade unions were particularly effective in securing concessions. The authors attribute this to the government's perception that the cost of accommodating union demands was lower than the anticipated disruption costs of potential protests. Building on this insight, as well as prior work on social movement and strike outcomes, we propose that the effectiveness of protest – or strike – threats depends on three key factors: (1) union characteristics that shape both the perceived credibility of the threat and the anticipated costs of conflict, (2) target characteristics, and (3) contextual conditions that affect both the disruption costs and the target's vulnerability to disruption.

Union-specific factors

The power resource theory (Korpi & Shalev, 1979) and the resource mobilisation theory (McCarthy & Zald, 1977) suggest that unions with large organisational capacities have power resources to pressure employers and gain concessions: a larger membership allows unions to involve more workers in potential strikes. Social movement research further shows that the number of participants increases the likelihood of protest 'success,' as large events tend to garner more media attention, thereby heightening public pressure on governments (Andrews & Caren, 2010; Chenoweth & Belgioioso, 2019; Wouters & Walgrave, 2017). Large-scale protests are particularly likely to act as signals to the target – whether governments or employers – regarding the need to implement political or economic change, or, in cases where the protest opposes a planned reform, to preserve the status quo. Such actions are generally more disruptive and raise the costs of non-response, making it harder for targets to ignore the underlying grievances (McAdam & Su, 2002). Accordingly, the disruption costs of a strike threat depend in part on a union's membership size.

The anticipated costs are even greater if the union can mobilise a large *proportion* of employees. Similar to the studies on strike outcomes, union density, rather than the absolute membership numbers, becomes important for eventual disruption costs. High-density unions can effectively halt industry-wide operations and interrupt the flow of goods and services (Wallace et al., 1989); their threat has high costs for employers. Lindvall (2013) finds that high-density unions achieve concessions without striking because politicians attempt to avoid significant open confrontations with such unions (p.539). The perceived costs would be too high. On the other hand, low-density unions are less likely to go on strike in the first place due to their low organisational capacity. If they do, the anticipated costs would still be low.

However, no target is likely to consider the potential costs of a protest if the threat does not appear sufficiently credible. Credibility is therefore a crucial factor while examining threats. If a large union has a reputation for compromise and avoids striking, its threat to strike may lack credibility. The credibility of a strike threat depends on the union's

capacity to carry it out – namely, its ability to mobilise members to take industrial action. Such mobilisation requires internal discipline, which is facilitated by a strong organisational identity (Jansson, 2020) and Swedish unions are characterised by high internal discipline.[2] A member who refuses to go on strike when ordered by the union is expelled. Thus, in contrast to Ovetz' study on non-unionised workers in the US (Ovetz, 2020), all strike threats in the Swedish context can be considered credible. We therefore assume that when employers assess how to respond to a threat, it is the scope of the potential disruption costs that becomes the decisive factor. Based on this, we expect that *strike threats issued by high-density unions are more likely to achieve their objectives than those issued by low-density unions (H1).*

Other trade union characteristics that affect the perceived conflict costs for the target relate to unions' cooperation. Research on social movement outcomes suggests that coalitions are more effective in achieving political objectives (van Dyke & Amos, 2017). Having allies increases the potential disruption costs (Luders 2010). While most of the studies on coalitions emphasise the positive effects of the cross-movement cooperation, i.e. unions aligning themselves with community groups and civil society organisations (P. Almeida, 2008; Dixon, 2023), building coalitions with other social movements is not straightforward for the labour movement, as it may dilute the union's core demands and impact its ability to represent members effectively (Heery et al., 2012). However, collaboration between different unions should be easier due to similar organisational structures and goals. A. W. Martin et al. (2017) show that strikes mobilised by trade union coalitions are more likely to increase costs for the targets in the US. In Sweden, coalition building between unions typically takes the form of bargaining cartels. Following the introduction of sectoral collective bargaining in 1983, such formalised union coalitions have become increasingly important, typically involving mutual support among cartel unions through solidarity actions. According to Swedish labour law, if one union becomes involved in a labour dispute, other unions have the right to join the action in solidarity. Therefore, multiple unions can simultaneously issue strike threats, thereby increasing the potential disruption costs for the target. When larger unions, or a large number of unions, form cartels, such coalitions can issue multiple, coordinated threats that impose considerable costs. Thus, we expect that *strike threats involving institutionalised trade union coalitions are more effective than those of a single union* (H2).

Target vulnerability

The potential costs of industrial action depend not only on the unions' characteristics but also on the economic sector being targeted. For example, the globalisation of the economy with the creation of global value chains and just-in-time production has made the *export*-oriented sector more vulnerable to the production disruptions that strikes create. Although globalisation has given employers more opportunities to relocate their production abroad (Bieler & Lindberg, 2010; Baccaro & Howell, 2017), thereby decreasing unions' willingness to strike, the vulnerability to strikes in the export sector is still profound. We therefore expect *that strike threats issued by unions in export-oriented sectors will be more effective than those issued by unions in non-export sectors (H3).*

While large export-oriented companies may be more concerned about disruptions in regular production activities, in a country with a large welfare state like Sweden, work

stoppages in the public sector affect a broader segment of the population. Consequently, public sector targets may be especially vulnerable to protest and perceive strike threats as more costly than those in other sectors. Although Massenkoff and Wilmers (2024) found that, in the US context, public sector strikes were less likely to result in wage increases than strikes in other industries, the situation in Sweden differs. Public sector services such as healthcare, education, and transportation are essential for daily life, and work stoppages in these sectors are likely to provoke widespread public concern. Since public sector funding is determined by elected officials who are sensitive to public opinion, collective bargaining in this domain is politicised (Høgedahl et al., 2024). As protests in the public sector can influence both public sentiment and political outcomes (Wouters & Walgrave, 2017), we expect *that strike threats issued by public sector unions will be more likely to succeed than those issued by unions in the private sector (H4).*

Contextual factors

Finally, the impact of strike threats is likely to vary based on institutional and political factors that affect the potential costs of the eventual strike for all involved parties. While the introduction of the Industrial Agreement in 1997 and the establishment of the National Mediation Office in 2000 have not eliminated the underlying causes of labour disputes, these have contributed to establishing a norm of avoiding industrial actions. Thus, the parties are encouraged to find a compromise. This institutional setting may reduce the overall frequency of strike threats, but those that do occur are more likely to result in negotiated settlements due to increased institutional pressure. Consequently, we expect *that the effectiveness of strike threats has increased in the period following the introduction of the Industrial Agreement (H5).*

The second institutional change relevant to our period of study concerns Sweden's accession to the European Union in 1995 and the EU enlargement in 2004. The free movement of labour within the EU expanded employers' power resources by enabling them to relocate production and recruit workers from lower-income Eastern European countries with lower unionisation rates. These developments have weakened union power (Breman et al., 2019, p. 245). If employers can replace striking workers, the vulnerability of the target decreases. Thus, these two reforms decrease the disruption costs of strikes. We therefore hypothesise *that the effectiveness of strike threats declined following EU accession and declined further after the 2004 enlargement (H6).*

Although H5 and H6 suggest opposing trends, existing theory offers no clear basis for determining which dynamic is likely to prevail

Data and measurement of variables

We test the proposed hypotheses through a quantitative analysis of labour disputes in Sweden from 1980 to 2023. Labour disputes occur when a collective bargaining process between a union and an employers' association fails, prompting one party to issue a notice of industrial action (*varsel om stridsåtgärd*). Although both unions and employers' associations have the authority to issue notices of strikes or lockouts in Sweden, we focus solely on union-initiated action (strikes). According to labour law, unions must send the notice of strike to the targeted employers and the NMO, which keeps detailed

records of the bargaining process. We collected and coded all NMO's archived notices of industrial action and mediation reports from 1980 onwards – approximately 20,000 documents that enable an in-depth examination of Swedish labour disputes. In this study, we focus solely on disputes that arise within the framework of wage bargaining rounds and involve a strike threat, excluding all threats related to other issues, such as political strikes.[3]

For each notice of industrial action, we have detailed information, including the name of the union issuing the threat, the date the notice was submitted, and the planned date of action. A single dispute may involve multiple strike threats, and unions can withdraw, revise, or issue new notices that expand the scope of the threatened action. Nearly 22% of the disputes in our dataset include notices that extend or intensify the original threat. While bargaining processes often involve several rounds of negotiation – sometimes with the involvement of mediators from the National Mediation Office (NMO) – we adopt a simplified approach.First, our unit of analysis is a dispute with at least one strike threat. Second, we assume that each dispute can have two possible outcomes: successful negotiations ending with no strike or failed negotiations escalating to a strike. The binary dependent variable is coded zero when the dispute ended with a strike and one otherwise.

As strikes are costly for both labour market parties, we assume that unions 'win' the dispute when they do not need to implement their threat (hence, they do not need to go on strike). It is a bold assumption, as it might mean that unions receive only a small compromise, a proportion of what they initially asked for. However, trade unions do not issue strike threats without good reason, and they are unlikely to withdraw such threats without securing concessions, as they are democratic organisations that must justify their actions to their members (Interview former union chairperson, Mediators' reports, NMO). Out of the 384 examined labour disputes, 67% ended with some concession for the unions, as no strike broke out.

Our first independent variable is trade *union density* (see Table 1 for all variables), which we have estimated for each trade union involved in a labour dispute in our sample. Union density provides a more accurate measure of union pressure than simple membership figures because a union with relatively few members but high union density can significantly disrupt production within an industry. For instance, the Swedish Paper Workers' Union, with only approximately 13,000 members, has a union density exceeding 90%, potentially allowing it to shut down the entire paper industry. As no union-level

Table 1. Descriptive data of the used variables (N= 398).

Variables	Mean	Standard dev.	Min	Max
Successful threat (dispute ended without a strike)	0.674	0.469	0	1
Mean union density	1.138	0.569	0	2
Coalition (institutionalised)	0.315	0.465	0	1
Dispute with any **export** sector union involved	0.153	0.361	0	1
Dispute with any **public** sector union involved	0.224	0.417	0	1
Years before **Sweden joined the EU** (1980–1995)	0.643	0.479	0	1
Years after the **EU enlargement** (2005–2023)	0.442	0.497	0	1
Years after the **Industrial Agreement** (1998–2023)	0.570	0.495	0	1
Controls				
Disputes with at least one **extended** threat	0.224	0.412	0	1
Annual **unemployment** rate for 1980–2023	6.667	2.483	2.2	11
Dispute involving **SAC**	0.242	0.429	0	1

density data is available, we created our own measure by combining data on unionisation levels across economic sectors and social classes (working class versus white-collar workers) from reports published by the Swedish Trade Union Confederation (LO, 2023). Density is categorised into three categories: 'low' when a union organises less than 50% of the employees in the sector, 'medium' for 50–75%, and 'high' when a union organises more than 75% of the employees in the sector. We account for the fact that unions' density varies over time and use the mean union density if more than one union were involved in the labour dispute. The squared density measure is also included in the analysis to examine the potential presence of a curvilinear relationship, similar to findings in the strike literature (Lindvall 2013).

Our second independent variable, institutionalised coalitions, captures whether the unions involved in a dispute were part of a bargaining cartel. Six cartels existed during the period. For example, PTK (Privattjänstemannakartellen) is the bargaining cartel for white-collar workers in the private sector, KTK (Kommunaltjänstemannakartellen) was the bargaining cartel for white-collar workers in the municipal sector, and OFR (Offentliganställdas förhandlingsråd) is the bargaining council for public sector employees. Overall, 24% of the disputes in our dataset involved at least one union affiliated with a bargaining cartel.

Further, we use dummy variables to denote export and public sector unions. The unions organising employees who produce goods for export have been coded as 'export-sector' unions, while the remaining unions are coded as 'non-export sector' unions. Determining whether a union mainly organises public or private sector employees is trickier. Welfare-state reforms and privatisations have blurred the distinction between Sweden's public and private sectors – for example, teachers can work in either public or private schools. We follow Blomqvist and Rothstein's (2008) distinction between the public and private sectors: if the service is funded by tax money, it is considered public sector. As classic public-sector domains such as education, healthcare and child and elderly care are still financed by the government (even though private actors can run schools or elderly care facilities), we categorise all unions in these domains as public-sector unions, and the rest as non-public sector unions. When multiple unions were involved in the dispute, the respective variable was coded as '1' if at least one export-oriented or public-sector union was involved.

Finally, to detect the effects of contextual and institutional factors, we use specific dummy variables to indicate whether the dispute occurred before or after the EU's accession (1980–1994) and before or after its enlargement (1995–2003). Similarly, we use a dummy variable in a separate model to indicate whether the disputes occurred before or after the Industrial Agreement of 1997.

We also use a few control variables. Since unemployment can affect both unions' willingness to strike and the vulnerability of targets to industrial action (Kaufman, 1982), we include the annual unemployment rate, as reported by Statistics Sweden (SCB), in our analysis. In periods of high unemployment, unions and their targets may assess the prospective costs of strikes differently than in periods of low unemployment. Furthermore, we control for the fact that during some disputes, threats were used to extend an already existing conflict (22% of the disputes). Extension typically involves increasing the number of workers called to participate. It signals increased costs for the target, but might also indicate difficulties for the union in the negotiation process.

Adding this variable to the analysis enables us to account for complex disputes. Finally, we account for the involvement of a specific outlier: the most militant union in Sweden, the Syndicalists (SAC). Although SAC is a small union with low union density, it is ideologically driven and frequently joins other unions' disputes in solidarity by issuing notices and following through with its actions. SAC was involved in 24% of the disputes.

The payoff of threats in labour disputes in Sweden 1980–2023

During the period examined, we accounted for 384 labour disputes in which unions made about 1500 threats of strikes (see Figure 1). The number of threats will always exceed the number of official strikes, as strikes without notice are, by definition, wildcat strikes.[4] However, as demonstrated by Figure 1, threats are far more common than strikes. Some disputes involve multiple threats from a single union. For example, the Swedish Municipal Workers Union (Kommunalarbetareförbundet) submitted almost 300 strike threats during the last major strike in Sweden in 2003. By constantly expanding their threat and targeting employers in new municipalities, the unions hoped to pressure the employer association to make concessions (Linderoth, 2020). This strategy, however, failed, and the dispute escalated into a significant strike.

Figure 1 also clearly shows that labour disputes still occur regularly, even though very few escalate into strikes. Thus, collective bargaining still involves a significant degree of contention, even if the strike statistics say otherwise. Figure 1 highlights the peak years of industrial conflict, corresponding to either particularly contentious wage bargaining rounds (e.g., 1993, 1995, 2007, 2013) or isolated but significant disputes

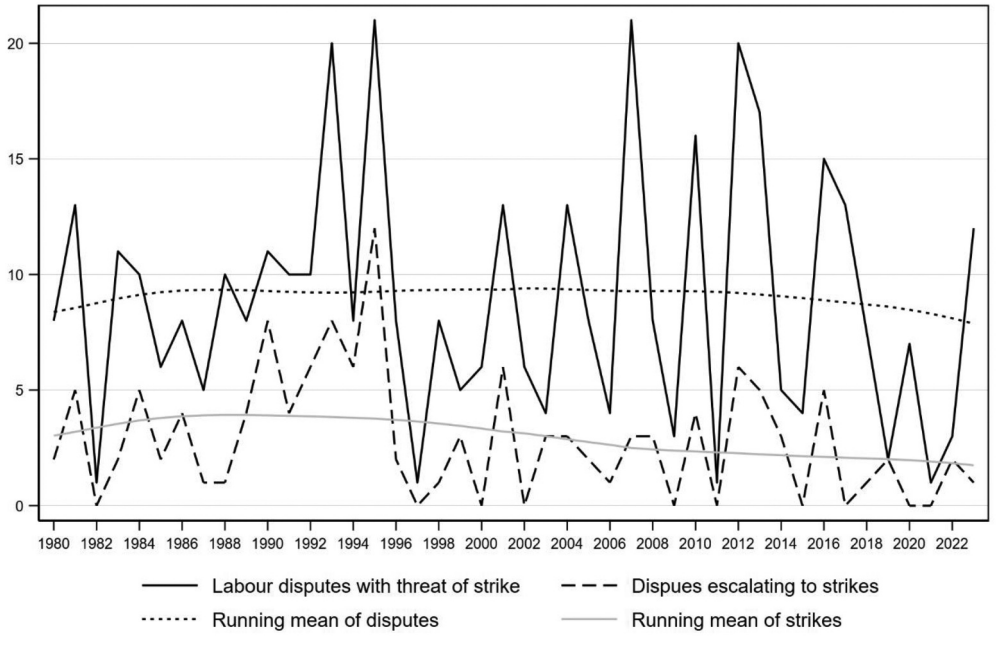

Figure 1. The annual number of labour disputes with threats of strikes and implemented strikes. Source: Authors' calculations

(e.g., 2003). The most significant official strikes occurred in 1986, 1988, 1995, and 2003.[5] Several years, such as 1982 and 2000, show no recorded strikes related to collective bargaining. These correspond to periods between major collective agreement negotiations, when opportunities for union-initiated strikes were strictly limited. Overall, relatively few labour disputes have escalated into full-scale industrial action, underscoring Sweden's reputation for maintaining comparatively peaceful labour market relations.

Our primary research objective is to examine whether merely issuing a threat enables unions to achieve their goals. Approximately 67% of the disputes concluded with union 'success' – that is, the union threatened to strike and secured concessions without having to carry out the strike. The two years when strike threats appeared to have been remarkably ineffective—1994 and 2019—were also years in which very few collective agreements were renegotiated, and only a small number of disputes were recorded (eight and two, respectively).

Analysing the varying effectiveness of strike threats

We test our hypotheses using simple logistic regression analysis, as our dependent variable is binary.

The results in Table 2 indicate a modest curvilinear relationship between union density and the effectiveness of strike threats in Sweden (see also Figure 2). Contrary to our expectations, disputes involving unions with relatively low union density, such as those representing hotel and restaurant workers, are more frequently resolved without a strike. In contrast, disputes involving high-density unions are more likely to result in industrial action. This pattern persists even after controlling for macroeconomic conditions (e.g., unemployment), expansion of the threat, and the involvement of the syndicalist union SAC. In line with findings from recent studies on strike outcomes (e.g., Addison & Teixeira, 2024), our analysis suggests that union density has a weak and slightly negative effect on the likelihood of a successful outcome through threat alone. These findings offer no empirical support for Hypothesis 1. Several factors may help explain these counterintuitive results.

One plausible explanation for these findings concerns the strategic role of low-density unions within the service sector. Since 2007, the Hotel and Restaurant Workers' Union has been notably active in issuing strike threats and has secured a comparatively high rate of success. This may be attributed to the structural vulnerability of employers in this sector, which is characterised by a predominance of small businesses with tight margins. Such firms are typically more exposed to the disruptive impact of strikes than the larger, more capital-intensive enterprises common in the industrial sector. A second explanation relates to the perceived concession costs associated with high-density unions. Owing to their size and organisational strength, high-density unions should be positioned to press for more substantial demands. Consequently, employers may perceive acquiescence to such demands as setting costly precedents, outweighing the short-term costs of industrial disruption. These findings raise important questions about the assumptions underpinning the power resource theory, particularly its claim that union density constitutes a core advantage in bargaining processes. In the context of strike *threats*, this assumption does not hold, pointing to the need for further research on the mechanisms that impact the success of protest threats in different settings.

Table 2. The determinants of the threat payoff (i.e. no strike).

	Model 1	Model 2	Model 3	Model 4	Model 5
Mean union density	−2.006***	−3.214***	−3.197***	−3.165***	−3.150***
	(0.770)	(1.053)	(1.046)	(1.035)	(1.030)
Density squared	0.853***	1.160***	1.150***	1.130***	1.124***
	(0.302)	(0.386)	(0.382)	(0.383)	(0.378)
Inst. Coalition (cartel)	0.304	0.484*	0.527**	0.493*	0.545**
	(0.254)	(0.273)	(0.267)	(0.273)	(0.266)
Export sector	−0.157	0.246		0.296	
	(0.321)	(0.342)		(0.339)	
Public sector			0.173		0.172
			(0.315)		(0.317)
Contextual variables					
Before the EU (1980–1994)	0.196	0.618	0.564		
	(0.300)	(0.386)	(0.388)		
EU enlargement (2004–2023)	0.730**	0.481	0.472		
	(0.312)	(0.346)	(0.349)		
Industrial agreement (1997+)				0.894***	0.831***
				(0.252)	(0.266)
Controls					
Unemployment		−0.074	−0.066	−0.035	−0.029
		(0.055)	(0.054)	(0.047)	(0.046)
Extended threat		−1.261***	−1.256***	−1.224***	−1.222***
		(0.281)	(0.283)	(0.277)	(0.280)
SAC		−1.244***	−1.247***	−1.256***	−1.250***
		(0.327)	(0.327)	(0.320)	(0.320)
Constant	1.155**	2.924***	2.886***	2.744***	2.716***
	(0.491)	(0.772)	(0.766)	(0.754)	(0.752)
Wald chi2	21.06	64.82	65.99	63.91	65.48
Pseudo R2	0.040	0.152	0.152	0.140	0.137
Observations	384	384	384	384	384

Note: Robust standard errors in parentheses, ***$p < 0.01$, **$p < 0.05$, *$p < 0.1$.

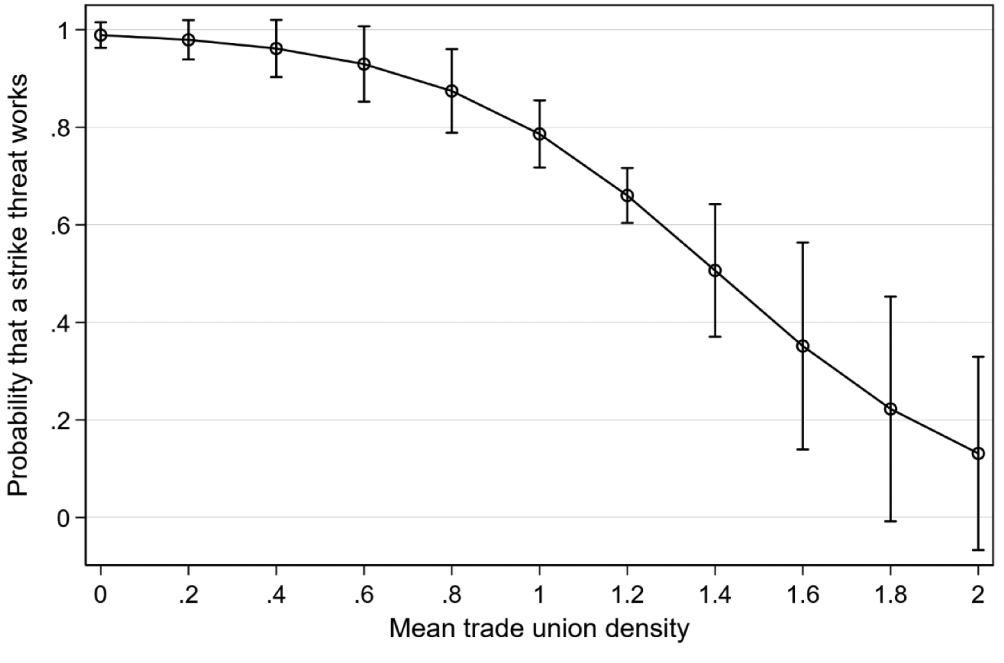

Figure 2. Strike threat and average union density.

Our second hypothesis was based on the idea that threats made by the institutionalised trade union coalitions might increase the effectiveness of the strike threat, and the results displayed in Table 2 support this. Although the effect is small, there is a clear tendency for labour disputes, which involve strike threats made by well-organised large bargaining cartels, to end without a strike. It is also worth noting that if we add a variable denoting solidarity threats in general (those issued by individual unions and not cartels) to the analysis, its relationship with the threat's payoff is slightly negative (see Appendix). The effect of the SAC variable characterises a similar trend. These findings suggest that disputes involving solidarity threats are more likely to end with a strike. A possible explanation is that these are complicated bargaining situations to begin with. Solidarity action might indicate that the parties in the specific bargaining situation are far from reaching an agreement when the first notice is given, and asking fellow unions for support through solidarity actions could be a sign of the severity of the situation.

Further, we have two separate models in Table 2 for analysing the effectiveness of threats in export and public sector-related disputes. We expected the target's vulnerability to be particularly notable in the export (H3) and public (H4) sectors. However, the results of our analyses (Models 2–5) do not show any significant correlation between the export or public sector and the effectiveness of the strike threat. There are some clear cases where public sector unions have threatened to strike and won concessions: for example, in 2016, when the Municipal Workers' Union (Sweden's second largest union at the time with more than 500,000 members) demanded increasing control over the workplace for the union and better working conditions, and the employers eventually agreed with most of the union's demands, and no strike took place (MI annual report, 2016, p. 79–80). However, we do not find any significant effects of the export and public sector variables; thus, we find no support for H3 or H4.

Finally, we formulated two contradictory hypotheses: H5, which posits that strike threats became more effective after the 1997 Industrial Agreement due to stronger institutional pressure to avoid industrial conflict, and H6, which attributes a decline in their effectiveness to employers' increased power and reduced vulnerability following the EU enlargement. Results in Table 2 support the first hypothesis, H5. Threatening to strike has been more likely to pay off since 1998 (Models 4 and 5), and this trend is also evident in Figure 3. The average proportions of disputes concluding with a concession were 22% (1980–1994), 18% (1995–2003) and 54% since 2004. Thus, one interpretation of these results is that the Industrial Agreement – and its norm of avoiding work stoppages – tends to override any power resources gained by the employers through the EU accession and enlargement. Although the effects are not substantial, a clear trend of increasing effectiveness is evident. As threats of strikes have increased over time, while strikes have declined, employers appear to have become slightly more responsive to union threats.

Finally, the control variable, unemployment, does not affect the payoff of strike threats. Threat extensions, on the other hand, have a strong negative correlation with the effectiveness of strike threats. While one could suggest that an extended threat puts more pressure on the employer and should increase the likelihood of a payoff, these extensions are likely a sign of increasing conflict levels and signify a particularly complex bargaining situation. If unions have not achieved their goals after the first threat, the expansion does not seem to pressure the employers enough to make concessions.

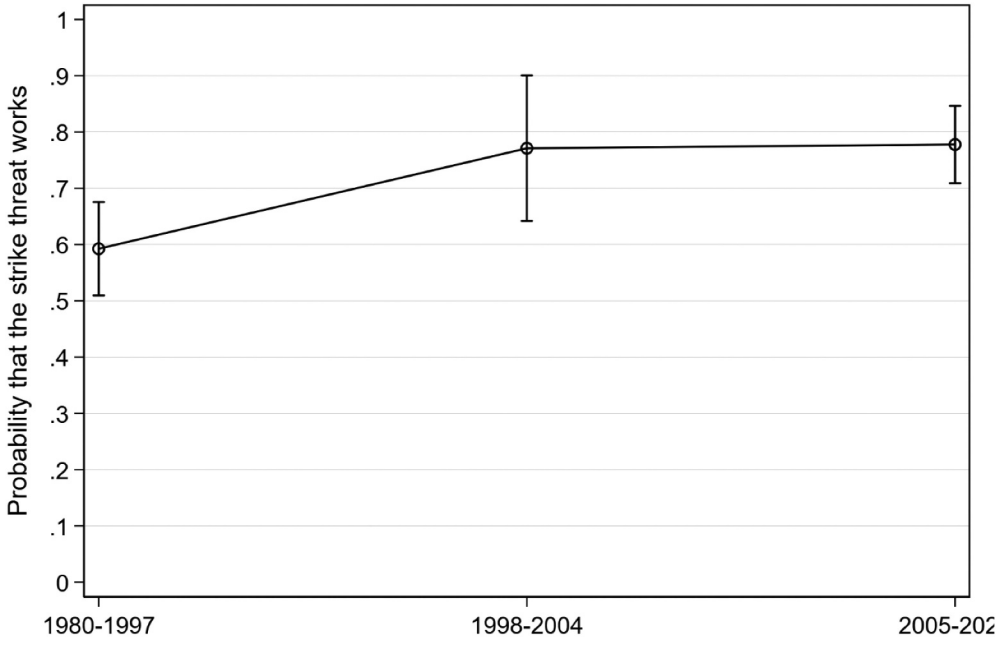

Figure 3. The increasing effectiveness of strike threats.

Concluding discussion

Within the scholarship on social movement outcomes, protests are often conceptualised as signals of public opinion and indicators of potential future disruption. These signals shape targets' responses by highlighting the prospective costs associated with non-compliance. However, when only a *threat* of protest is issued, the targets must rely on anticipated future costs – an estimation shaped primarily by the credibility of the threat and their own structural vulnerability. This article has examined precisely this dynamic, exploring the effectiveness of strike threats issued by Swedish unions and investigating how characteristics of unions (such as union density and coalition involvement), employers' attributes, and broader institutional contexts influence outcomes.

Utilising comprehensive data from labour disputes between 1980 and 2023, we classified instances in which strike threats were issued but not executed as successful outcomes. Our analysis demonstrates that strike threats frequently elicit concessions from employers and that the effectiveness of such threats has increased notably over time, particularly following the Industrial Agreement (1997). This rising effectiveness underscores the strategic significance of non-mobilised protest actions in contemporary labour relations. It also highlights the need for further theoretical and empirical inquiry into the conditions under which threats of protests – rather than executed actions – yield political or economic gains.

However, several of our hypotheses were not supported. Contrary to the assumptions of power resource theory, labour disputes involving low-density unions were more likely resolved without a work stoppage than those involving high-density unions. In addition, we found no systematic evidence that disputes in the export-oriented or public sectors

were more or less likely resolved through threats alone. These unexpected results may reflect some limitations in our analysis. First, our approach assumes that all disputes ending without industrial action involve some form of concession, without accounting for variation in bargaining duration or the substantive nature of the underlying conflicts. Second, the data, especially for the period before the 2000s, are limited in coverage and detail, constraining our ability to assess employer vulnerability or the costs of concessions. Future research would benefit from more granular data on union demands and employer responses, which would enhance our understanding of the strategic considerations underlying reactions to strike threats.

Furthermore, several of our hypotheses were derived from industrial relation theories that primarily focus on actual strike *actions*. However, understanding the effectiveness of threats in labour disputes may require developing a distinct theoretical framework on threats. While social movement scholarship provides useful theoretical perspectives on protest threats, the institutionalised nature of wage bargaining likely requires a more nuanced approach, which incorporates negotiation strategies, bargaining institutions, and the role of mediators.

Contrary to the findings of Vüllers and Schwarz (2019) regarding the importance of protest threat credibility, in the Swedish context, such credibility is largely taken for granted. Based on historical experience, employers' associations understand that once a notice of industrial action is submitted, the unions will follow through if no agreement is reached. Without some form of concession – however minor – unions are unlikely to withdraw their threats, as they must justify such decisions to their members. Although credibility may be exceptionally high in the Swedish case, future research should examine whether this is a specific characteristic of Swedish (and broader Nordic) unions. Given that most unions are capable of mobilising their members for strike action – and possess internal enforcement mechanisms, such as the expulsion of members who refuse to comply – it is plausible that credibility plays a comparatively smaller role in union-issued threats within collective bargaining processes than in protest threats articulated by other social movements.

Unions with low density and few members, such as those in the service sector, may demonstrate greater flexibility and settle for minor concessions, making their threats effective but yielding fewer substantive gains. In contrast, unions embedded in institutionalised coalitions (bargaining cartels) tend to issue more effective threats and are less inclined to accept minor concessions, given their capacity to mobilise broader segments of the workforce than any single union.

To what extent are our findings generalisable beyond the Swedish context? Swedish trade unions benefit from substantial resources due to their comparatively high membership rates, and they are part of a well-coordinated collective bargaining system. These are factors that, as we show, enhance the effectiveness of strike threats. In particular, the rising 'success rate' of threats is closely linked to institutional developments, notably the wage bargaining system established by the Industrial Agreement. Nevertheless, the Swedish case also reveals dynamics with broader relevance. For instance, low-density unions may succeed with strike threats when their actions risk imposing costs on vulnerable targets or causing inconvenience to the broader public, even in other countries. More generally, the target vulnerability matters, especially when protest threats originate from social movement organisations with strong organisational capacity and

broad membership. Still, even within Sweden, the data show contextual dependency: low-density unions may succeed through strike threats when targeting vulnerable employers or threatening to cause inconvenience to a broader public, for example, in the service sector. Future research should investigate whether similar trends are observable in other national contexts to provide a more comprehensive picture of the evolving dynamics of labour disputes in the modern era.

Finally, our analysis highlights the importance of incorporating the threat of industrial action in labour movement research. A narrow focus on strikes alone no longer captures the full scope of labour market contention. As our findings show, unions and employers continue to engage in disputes over work-related issues – even within one of the most peaceful industrial relations contexts. Advancing our understanding of the varieties of labour disputes requires differentiating between distinct forms of union mobilisation, such as strike threats and blockades. Moreover, while our study aligns with social movement research that emphasises target vulnerability (e.g., Jasper & King, 2020), we were limited by the need to infer – rather than directly measure – the eventual disruption and concession costs. Future research could address this by considering the duration and trajectory of the bargaining process. Given the continued scholarly interest in the political and economic outcomes of social movement mobilisation, developing dynamic models that account for the evolving nature of activist-target interactions remains a crucial task.

Notes

1. Decentralization of wage bargaining was introduced, but in the public sector.
2. While Swedish unions have historically created and nourished an organisational identity through study activities (Jansson, 2020, 2023), there are some differences across time and unions – especially the unions of white-collar workers have weaker identities (Jansson, 2022).
3. The majority of the threats in relation to collective bargaining involve strikes, even though some of them are combined with blockades. We discuss the differences between the strategies elsewhere (Authors, 2025).
4. Note that measuring the annual number of strikes is complex, as strikes can span several months and may occur across multiple locations simultaneously. Our measure of strikes is tied specifically to labour disputes during wage bargaining rounds – whether it results in a strike or not. This differs from the official figures provided by the NMO, that includes both official and unofficial strikes without a precise definition of what constitutes an individual event (see MI, 2023, https://www.mi.se/app/uploads/Konflikttabell_1965–2024.pdf). Generally, the official strike counts are somewhat higher than our findings since we only analyse industrial action during wage bargaining. But there are other types of disputes, for example international solidarity actions or when unions demand collective agreements. Thus, while NMO reports three strikes for 2019, our data records only two; similarly, NMO lists 53 strikes for 1983, whereas our archival search identifies only two major strikes for that year.
5. These notable strikes involved respective number of working days lost (WDL): 1986 (677 678 WDL), 1988 (582 480 WDL), 1995 (545 555 WDL), and 2003 (626 980 WDL).

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