Editorial

EID

Economic and Industrial Democracy
2019, Vol. 40(1) 3–19

DOI: 10.1177/0143831X18781714
journals.sagepub.com/home/eid
SAGE

Theoretical and empirical links between trade unions and democracy

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Article by an MPIfG researcher
Lucio Baccaro, Chiara Benassi, Guglielmo Meardi: Theoretical and Empirical Links Between Trade Unions and Democracy. In: Economic and Industrial Democracy 40(1), 3-19 (2019). Sage Publications
The original publication is available at the publisher's web site: https://doi.org/10.1177/0143831X18781714

Abstract

This special issue wants to honour the memory of Giulio Regeni, a PhD student at the University of Cambridge who was assassinated while he was conducting field research on independent trade unions in Egypt. This introduction and the following articles focus on the theoretical, empirical and methodological questions at the core of Regeni's research. Unions have traditionally been regarded as crucial for representing the interests of the working class as a whole and for building and sustaining industrial and political democracy; however, there is a debate about the conditions under which unions can be effective, and the role of unions' internal democracy is particularly controversial. The article discusses the theoretical linkages between trade unions, democratization and union democracy and concludes with a reflection on the new concerns about the risk of conducting field research on these issues raised by Regeni's death.

Keywords

Corporatism, democracy, democratization, unions

Introduction

The brutal kidnapping, torturing and killing of Giulio Regeni in early 2016 while conducting field research in Egypt and the subsequent cover-up by the el-Sisi regime

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have raised concerns not only with regard to the state of human rights in Egypt, but also with regard to the risks involved in research on labour movements. Regeni, a promising researcher at the intersection of development and labour studies, was studying the role of independent trade unions in the (non)democratization process in Egypt. After a first-class degree for his BA in Arabic and Politics at the University of Leeds, a Master's degree in Development Studies at the University of Cambridge, and work in Cairo for the United Nations Industrial Development Organization (UNIDO), he had undertaken a PhD at the University of Cambridge, in collaboration with the American University in Cairo.

In dark times, scholars are killed for their search for truth. This has happened also in the politically sensitive field of labour studies, but fortunately very rarely. David Webster, labour ethnographer, and Ruth First, a labour reporter, scholar and political activist, were both killed by the apartheid regime in the 1980s. Students and researchers on labour rights disappeared during the dictatorships of Argentina, Chile and other countries, and more were detained across Latin America, Africa and communist bloc countries. The state has not been the only perpetrator of such violence: as Italians, the authors of this introduction remember well the killing of colleagues Ezio Tarantelli, Massimo D'Antona and Marco Biagi at the hands of the Red Brigades. Yet in the 21st century, many of us had come to assume that these things could not happen again. We were obviously wrong and a thorough reflection is needed.

Regeni's research interests in democracy and labour coincided with the mission of *Economic and Industrial Democracy*, and this special issue in his honour wants to pursue his research questions on trade unions, democratization, union democracy and inclusion of peripheral workers. In this article, we frame the theoretical, empirical and methodological questions at the core of Regeni's budding research agenda and, in the process, introduce the articles of this special issue.

Trade unions and democratization: An interrupted cycle?

The link between trade unions and democracy has been of paramount importance since the emergence of the 'labour problem', as reflected by the concept of 'Industrial Democracy' (Webb and Webb, 1897). This concept systematically linked the workplace to the broader political context in which it is embedded. Recently, however, research has focused on employee voice and representation within the workplace only (Wilkinson et al., 2014), paying less attention to the political sphere and broader society. Yet the link between labour organizations and democracy remains critical across emerging and advanced economies.

Following the so-called 'third wave of democratization' in the 1980s, political scientists Rueschemeyer, Stephens and Stephens (1992) compared 37 historical cases of democratization to conclude that across the 19th and 20th centuries the working class most frequently promoted the full extension of democratic rights. This argument challenged the mainstream view that formal democracy is the business of the bourgeoisie and that the middle class is the primary promoter of democracy, while the upper and especially the lower classes are inclined to authoritarianism (Lipset, 1959). By 'working class', Rueschemeyer et al. meant 'organized working class' hence the trade unions,

although never in isolation: it was the organizational skills, alongside numerical force, that gave workers the capacity to benefit from democracy. This argument was corroborated by Valenzuela's research on Latin America (1989), which pointed out the importance of labour organizational capacity, its ability to disrupt the economy, and impossibility of total repression for democratization.

Today, Rueschemeyer et al.'s argument deserves re-examination. The geographical distribution of their cases was uneven, with no consideration of Africa and Eastern Europe and, for the whole of Asia, only a rapid discussion of South Korea. Theoretically, other scholars argued that labour mobilization is a product rather than a prerequisite of democracy (Schmitter, 1993) and that capitalism is at odds with democracy (Przeworski, 1991) and, as a result, trade unions' contribution to democracy is conditional on their development into corporatist actors (Schmitter, 1993).

On one side, their argument appeared vindicated by important cases of democratization with a strong input from labour organizations which received particular attention from scholars, especially Poland (Ost, 1990) and South Africa (Adler and Webster, 2000), as well as by further reflections on the South Korean path (Kwon and O'Donnell, 1999). On the other side, the contribution of labour to many other cases of democratization is ambiguous or even not apparent. The recent democratization attempts in Asia and Africa were mostly presented as spontaneous upheavals of the civil society against military regimes, religious fundamentalism and post-colonial ideologies (Dabashi, 2012; Howard and Hussain, 2013; Stepan and Linz, 2013) rather than as expression of class struggle. While there is evidence of labour activism, from Malaysia (Croucher and Miles, 2018) to the Arab Spring (Alexander, 2010), its role in the democratization process is still difficult to interpret – as Regeni's pioneering research was trying to do. At the same time, China challenged theories of labour and democracy, as labour conflicts in a country so enthusiastically embracing capitalism have been so far insulated from the political sphere (Pringle and Clarke, 2011).

Even worse, in Romania in 1990 and 1991, and in Yugoslavia in 1991, the working class was mobilized against democracy and over time more subtle forms of 'illiberal democracy' emerged (Greskovits, 2015). Furthermore, in Mexico and Argentina trade unions with an authoritarian past have been considered political allies of neo-populist parties and of corrupt elites also in the neoliberal context (Atzeni and Ghigliani, 2008; Brysk, 2000). Even in Poland – the country where democratization was most clearly led by a trade union, and where Solidarity's legacies had the potential to contribute to a vital democracy (Meardi, 2005) – subsequent developments led observers to speak of a 'defeat of Solidarity' and of labour illiberalism (Ost, 2005), and Solidarity's open support after 2015 for an illiberal government shows the extent of working-class disaffection towards democracy (Bernaciak, 2017). The post-transition experience of Poland tells that trade union inclusion in corporatist policy making of democratizing countries may have different functions than in established democratic and corporatist countries (Meardi et al., 2015). In post-authoritarian transitions, for instance with the Spanish Moncloa pacts of 1977, corporatist involvement has tended to play legitimacy functions rather than regulatory and expressive ones. In the long run, this has hampered the autonomous development of interest associations such as trade unions and limited their very contribution to democracy (Meardi et al., 2015).

Importantly, the complex relationship between labour and democracy in Asia, Africa, Eastern Europe and Latin America cannot be written off as a side-effect of the weakening of labour: in fact, a shift of labour activism from post-industrial to late-industrial countries, or from 'North' to 'South', has been convincingly identified (Silver, 2003). Yet the democratic traction of organized labour appears less clear than in the past. In this special issue, Feltrin provides a strong insight from North Africa to help understand why the labour roles and effects are so different, by pointing to the differences of labour power between the cases of Tunisia and Morocco. If his line of argument is correct, the broader difficulty of democracy stems less from the fact that labour is becoming less democratic, and more from the fact that it is becoming weaker. In their contribution, Hartshorn and Sil focus on the *how* unions affect democracy rather than the *why*, and through the comparison of Poland, South Africa and Tunisia they point at strong union–party relations (more than corporatist inclusion) as dysfunctional for unions' contribution to democratization.

Trade unions and the crisis of political democracy

The weakening of trade unions is not unrelated to a perceived crisis of democracy in established democratic countries as it has corroded a pillar of capitalism's democratic legitimation and hampered the potential of 'associational democracy' (Baccaro, 2006). Past arguments had stressed the positive roles of unions, and industrial democracy, for political democracy (Verba et al., 1995), and were confirmed by recent evidence about the mutually reinforcing relationship between voice at work and in politics, and indirect effects through improvements in work quality and social security (Adman, 2008; Bryson et al., 2014; Godard, 2007), even though the positive effect of workplace voice on democratic participation is only confirmed in old democracies and new post-fascist countries, but not in new post-communist ones (Budd et al., 2017) – a qualitative difference which might explain cases like Poland, as mentioned above.

And yet, even in old democracies, the positive effects of unions on the quality of democracy cannot be taken for granted. A large literature documents, on the one hand, the shifting allegiance of the working class, increasingly attracted by new, populist or even right-wing parties, and, on the other hand, the repositioning of mainstream social democratic parties away from their traditional working-class constituencies towards new social groups (e.g. the so-called 'socio-cultural professionals') characterized by higher education and more cosmopolitan and less nationalistic cultural attitudes (Afonso and Rennwald, 2018; Betz and Meret, 2013; Gingrich and Häusermann, 2015; Kriesi et al., 2006; Oesch and Rennwald, 2018). Until the 1990s, only a selected number of politicians and political entrepreneurs – e.g. Jean-Marie Le Pen in France, Pat Buchanan in the USA and Umberto Bossi in Italy – benefited from the shift in working-class vote. However, the phenomenon has gained momentum in the last two years with the Brexit vote in the UK, the election of Donald Trump in the US, and the remarkable electoral performance of Marine Le Pen's Front National, all of which have been described as expressions of 'white-working class' reaction to immigration and multiculturalism (Gest, 2016).

The disaffection of the working class for trade unions and democratic institutions has found different explanations. In what Crouch (2004) calls 'post-democracy', formal democratic institutions – and industrial democracy institutions in particular – seem to

have lost their decisional powers: if, under increased competitive pressure, negotiations become consultations, bargaining becomes concession bargaining and voice becomes mere expression, workers may be justified in wondering what trade unions are still for. In particular, the weakening of trade unions' roles in wage setting and their inability to redistribute companies' gains from globalization to workers have contributed to rising inequality, which threatens the legitimacy of democracy (Baccaro, 2011) and might contribute to the rise of populism among the working class as a reaction to globalization (Dancygier and Walter, 2015).

Furthermore, the fall in unionization may contribute to the declining quality of democracy because unions have been found to affect individual electoral participation and electoral choice (Rennwald, 2013). The literature on the political effects of union membership generally finds that union membership is associated with greater voter turnout and greater support for left or labour parties (Ahlquist, 2017; Freeman, 2003; Kerrissey and Schofer, 2013). Other literature argues that union membership favours the emergence of a sense of solidarity among workers. Discursive interactions within trade unions lead workers to develop a better sense of the commonality of their interests (Ahlquist and Levi, 2013). Moreover, union membership has been argued to promote the emergence of both more enlightened (among low-paid workers who would benefit from redistribution) and more solidaristic (among high-paid workers) preferences (Mosimann and Pontusson, 2017).

The main problem with this literature is that we often cannot tell whether unions mostly produce these outcomes (e.g. through preference-transformation), or mostly select workers who are ex ante more likely to have these preferences before joining (Hadziabdic and Baccaro, 2018). There are of course other possibilities: unions as organizations may lead workers to act on their dormant preferences (for example, through 'get-out-the-vote' campaigns), or may influence the public policy framework in ways that are more favourable to the electoral mobilization of the poor (e.g. by pushing for less restrictive voting registration rules).

Recent research is sceptical about the effectiveness of union attempts to create forms of democratic control of the global economy (Rodrik, 2012; Streeck, 2016). At the same time, the current threat of anti-system politics highlights unexpected opportunities for unions to gain a political role on a sensitive issue that governments can hardly tackle alone (Meardi, 2018).

In their contribution to this special issue, Mosimann et al. suggest that trade unions may act as a barrier to the spread of right-wing populist attitudes within the working class through a combination of selection and preference-shaping effects. In other words, membership in trade unions could make workers more aware that their interests are better served by traditional labour-oriented parties than by the anti-immigrant and welfare-chauvinist rhetoric of new right parties.

The difficulties of trade unions with political democracy discussed above immediately raise the issue of the difficulties of democracy *within* trade unions. In the following two sections we discuss the linkages between internal democracy and industrial democracy from two perspectives: on the one hand, the ability of unions to listen to their members, aggregate their interests and represent them; on the other hand, their capacity to include and unify an increasingly diverse and precarious workforce.

Union democracy and its effects

Beginning with Lipset et al.'s seminal *Union Democracy* (1956), scholars have investigated under what conditions democratic procedures can be sustained within unions. As unions become institutionally embedded in the economic and political system, they fall prey to the 'iron law of oligarchy' (Michels, 1966), i.e. develop an autocratic leadership increasingly detached from the rank-and-file even though formal democratic procedures exist, and pursue the primary goal of organizational survival rather than working-class interests (Piven and Cloward, 1979).

Lipset et al. (1956) thought that democratic governance could only survive in a deviant case like the International Typographical Union (ITU), in which the presence of an unusually cohesive and segregated occupational community promoted a high degree of rank-and-file involvement and participation in union affairs, a condition that '[could] not be met most of the time in most unions or other voluntary groups' (Lipset et al., 1956: 403).

Different authors adopt different definitions of union democracy. Lipset et al. (1956) defined union democracy as competitive elections between opposing internal factions, i.e. as representative democracy. Other literature links union democracy to direct democratic procedures and specifically to the practice of workplace referenda for the ratification of bargaining agreements (Baccaro, 2001).

Views about the effects of union democracy are similarly varied. While Gumbrell-McCormick and Hyman in this issue consider that a democratic union is better able to organize workers than a non-democratic one, an older literature, especially American, regards union democracy as detrimental to union effectiveness because of its tendency to reduce the autonomy of union leaders (Ross, 1956). This literature argued that union democracy would lead union officials to bow to the myopic demands of their members and to overlook the long-term interests of the organization, the legitimate rights of minorities and broader societal interests (Lipset, 1962: 431–432). Bok and Dunlop (1970: 86) reviewed the record of the ITU, the union that Lipset et al. (1956) had studied, and argued that union democracy had led this union to stamp on minority rights and take a dubious stance vis-a-vis groups outside the union's traditional constituency. Walton and McKersie (1991: 287) argued that union democracy led to an escalation of bargaining demands, since union members tended to be more myopic and impulsive than their leaders. Finally, Jack Barbash (1967: 129) argued that union leaders needed to distance themselves from the grassroots level in order to be effective in bargaining.

These views assume that members have systematically more 'extreme' preferences than their leaders, and that rank-and-file influence over organizational policy (through procedures like ratification of collective agreements or frequent re-election of union representatives) leads to militancy and/or unwillingness to compromise, which, in turn, may produce undesirable outcomes like higher inflation and/or unemployment rates, and higher levels of industrial conflict than in comparable circumstances. However, the opposite state of affairs is conceivable, namely one in which leaders have systematically more extreme preferences than their members and in which the introduction of democratic decision-making produces opposite consequences from those stated above. This opposite line of thinking seems to have motivated the union governance reforms of the Thatcher and Major era in the UK (e.g. compulsory balloting prior to strikes), whereby

the government sought to weaken trade unions by empowering members at the expense of leaders (Undy and Martin, 1984; Undy et al., 1996).

A particularly controversial theme is the relationship between union democracy and the 'general interest' as opposed to group interests. The literature, again going back to Lipset, suggests that union democracy may have adverse effects on third parties and/or society as a whole. There may be a conflict between democracy in a 'partial society' such as a trade union, and the interests, views and goals of the public at large. Members of the body politic do not participate in the internal democratic process of trade unions and thus have no influence on it but are nonetheless affected by its outcomes.

These themes featured prominently in the European neo-corporatist literature of the 1970s and 1980s. Neo-corporatist theory (and practice) emerged as a response to the spectacular labour mobilizations of the late 1960s to early 1970s and the ensuing problem of stagflation. To increase the governability of advanced industrialized countries, neo-corporatist scholars looked at the European corporatist societies of the 1920s and 1930s as a source of inspiration. In these societies, interests were not allowed to organize freely. They were channelled, instead, into functionally differentiated and compulsory organizations – true and proper administrative branches of the state – in which a (forced) synthesis of societal interests was accomplished.

The leading idea of neo-corporatist theory was that it was possible even for the non-authoritarian regimes of the postwar period to replicate certain traits of the old corporatist regimes without blatant infringements of liberal rights and liberties (Schmitter, 1979, 1981). This required the state to take an active role by selecting from the universe of groups those with greater capacity for 'encompassing' representation (Olson, 1965), and by helping the leaders of these organizations to gain autonomy from the members through measures like legal recognition, compulsory membership, automatic collection of dues and direct access to public funds (Offe, 1981). Neo-corporatist scholars shared the American industrial relations scholars' general distrust of members and appreciation for the responsibility and clairvoyance of leaders. Wolfgang Streeck summarized this literature as follows: ' "Too much" democracy – or, if one wanted to fudge the issue, the "wrong kind" of democracy – was shown to be detrimental to the collective interest' (Streeck, 1988: 313).

However, these views about the negative effects of union democracy have not gone unchallenged. Research has shown that there are situations in which union democracy may have a directly beneficial impact on the reconciliation between group interests and societal interests and that non-democratic union organizations are not necessarily better suited to the equitable representation of worker interests within the economic system as a whole (Baccaro, 2003, 2014). For example, absent electoral mechanisms for registering worker preferences, leaders may not know exactly what these preferences are and may therefore base their choices on the preferences of a sub-sample of the entire working population, e.g. those workers who participate in strikes, whose preferences are not representative of the workers at large (Pizzorno, 1978). Thus, union democracy may have an *informational* role. Democratic decision-making procedures may also have a *moderating* role (in the sense of favouring more moderate decisions). Adoption of democratic procedures levels out the different degrees of intensity in the members' preferences (Dahl, 1956). The vote of workers who are ready to engage in collective action counts as much

as that of more quiescent workers in determining collective decisions. Furthermore, the minority's claim to truly represent the workers' will is dispelled.

Moreover, union democracy may have a *preference-shaping* effect. Democracy is more than just an aggregation of pre-existing preferences. If often shapes or changes preferences, as often argued in the literature on deliberation (Gutmann and Thompson, 1996; Habermas, 1996). In several circumstances workers do not have well-defined, let alone fixed, preferences about alternative policy options. They rely on leaders as well as interactions with co-workers to evaluate the alternatives they are faced with (especially when this evaluation requires expert, technical knowledge). The communicative processes associated with union democracy give union leaders ample opportunities to influence the members' process of preference formation.

The above examples suggest that the dichotomy between strong leaders vs weak workers (and vice versa) is overly simplified. Union democracy may strengthen some leaders at the expense of other leaders depending on the type of union, its encompassingness, and the diversity of internal constituency. It may lead to internalization of third party interests in some cases, and to the emergence of group egoism in others. The effects of union democracy on the functioning of industrial democracy seem highly contingent and difficult to generalize.

Democracy and inclusion: Virtuous or vicious relationship?

Union democracy, and the abovementioned ability of unions to shape preferences and aggregate interests, are also crucial for the inclusion and representation of the working class as a whole. While trade unionism, as the term itself indicates, stresses working-class *unity*, differences *within* the working class were apparent since the very beginning of trade unions, as witnessed by Engels' idea of a reserve army of labour, by the disputes between Marx and Bakunin on the 'labour aristocracy', and by Marx's historical writings on class struggles in France (Bakunin, 1971 [1872]; Engels, 1987 [1845]; Marx, 1964 [1850]). The existence of different constituencies with potentially conflicting interests draws attention to the *political* processes through which a synthesis is accomplished (or not). From the late 20th century, despite Marxist theories of deskilling leading to homogenization and the 'interchangeability of persons and functions' (Braverman, 1974: 359), attention to working-class internal diversity has increased (Hyman, 1997; Offe and Wiesenthal, 1985; Rueschemeyer et al., 1992: 53–55). The process of working-class unification is regarded as fundamental not just for furthering workers' interests, but also for the emancipation of subordinated groups, e.g. peasantry and rural workers (Rueschemeyer et al., 1992; see also Feltrin's and Hartshorn and Sil's contributions to this special issue).

Yet, the claim that unions can effectively represent the whole working class has been challenged from different perspectives. The literature on insiders and outsiders has forcefully argued that unions exclusively represent the interests of labour market insiders (permanent workers in full-time employment) at the expense of labour market outsiders such as young workers, unemployed and precarious workers (Häusermann, 2010; Lindbeck and Snower, 1986). An older literature has documented how unions introduce barriers to access internal labour markets, restrict skill supply and protect the core workforce from market pressure (Goldthorpe, 1984; Rubery 1978). Research evidence from

South Korea (Yang, 2006) and Germany (Hassel, 2014) appears to buttress the claim that unions contribute to workforce segmentation.

However, other literature suggests otherwise. The segmentation effect is contingent on the institutional context (Pulignano et al., 2015). In countries with high dismissal protection unions do not support provisions to the benefit of marginal workers (e.g. active labour market policies) because insiders are protected from labour market risks (Rueda, 2007). In contrast, in countries characterized by the Ghent system union strategies are more inclusive because marginal workers are part of the union constituencies and therefore influence bargaining priorities (Lindvall and Rueda, 2014). Other research has found that encompassing collective bargaining institutions and class- or society-orientated union identities (Hyman, 2001) lead unions to extend wage and working standards negotiated for their members to peripheral workers as well (Benassi and Vlandas, 2016; Marino, 2015).

Nonetheless, specific workforce segments such as women, migrants and other minority groups do tend to be excluded from unions, independently from the institutional context. Some scholars have argued that discrimination against minority groups is driven by racism and machismo among core union members and activists (Cockburn, 1991; Gilroy, 2013). Others have showed that unions routinely adopt strategies preventing them from diversifying the membership pool (Hassel, 2007). More recently, scholars have pointed at unions' attempts to organize workers around class identity as one of the obstacles to representing women, migrants and other minority workforce groups. By so doing, unions do not recognize the specific challenges faced by these groups in the labour market and, consequently, are unable to address them (Tapia et al., 2017). This problem is exacerbated by unions' 'oligarchy' of male, high-status and native-born employees (Colgan and Ledwith, 2002).

Unions' inability to include new and/or marginal workforce segments is seen as one of the main causes of their decline (Ackers, 2015). The decline of bargaining coverage and its growing fragmentation (Baccaro and Howell, 2017) prevent, it has been argued, the extension of negotiated protections to new and peripheral worker groups (Benassi et al., 2016).

How can unions regain their representativeness and become more inclusive? Gumbrell-McCormick and Hyman argue in this special issue that reviving employees' direct and active participation – *internal democracy* – is crucial to *industrial democracy*. As documented by the revitalization literature, unions have adopted an organizing approach for activating employees in unionized workplaces and for recruiting new and peripheral workforce segments (Frege and Kelly, 2003; Ibsen and Tapia, 2017). Organizing strategies often include aggregating the interests of employees around issues which affect them directly, often framing them as a matter of justice or dignity (Heery, 2002). Even though organizing is crucial for unions with limited institutional support, like those in Anglo-Saxon countries (Baccaro et al., 2003), more institutionally embedded unions have also embraced the organizing approach. For example, Dutch and German unions have tried to organize fixed-term workers, agency workers and low-end service workers (Benassi and Dorigatti, 2015; Vandaele and Leschke, 2010). Recently, Tapia et al. (2017) have argued that the adoption of an intersectional organizing approach contributes to the recruitment, mobilization and integration of minority groups.

However, scholars agree that, in order for inclusive representation to be sustained in the long term, it is not enough to reach out to new constituencies, they need to be able to directly participate in the decision-making processes of the union. This may include the necessity to 'open up' union oligarchy and to have a more politically engaged and diverse union leadership, e.g. by introducing representation quotas (Colgan and Ledwith, 2002). Some have argued that the creation of self-organized groups (e.g. for women, black workers, LGBT workers) within the union is even more effective for workforce inclusion as long as mechanisms of democratic participation and appropriate resources are in place (Humphrey, 2017; Marino, 2015). In their comparison between Italian and Polish unions for this special issue, Marino et al. explore this issue and argue that decentralized union structures and working-class ideology enable the inclusion of atypical workers.

Decline of fieldwork research?

The violent death of Giulio Regeni also raises questions about data collection and dangerous fieldwork. Investigating the relationship between unionism and democracy is long, challenging and, in certain circumstances, risky. While research in this field is methodologically pluralist (as this special issue is), in-depth fieldwork has often proven essential for advancing knowledge, especially when the topic is labour resistance to authoritarian management and autocratic regimes, which, almost by definition, make official data and information unreliable.

Fieldwork allows uncovering 'the power relationships which are masked and exposed in complex ways in most societies' (Brown and Wright, 1994: 163) and, in particular, the power dynamics between labour, capital and the state, which are dependent on the local context. Fieldwork also allows investigating stories which do not make it to the official record and the often informal side of labour relations, workers' organizing and collective action (Brown and Wright, 1994; Thompson and Hartley, 2007). As argued by William Brown in this special issue, exactly for these reasons fieldwork has been a central feature of industrial relations research since its origins. Yet, the context is not propitious to conducting fieldwork, especially in non-democratic contexts. We emphasize two trends which have the potential to undermine this research tradition: the increasing pressure to publish, particularly in leading journals, and the increasing securitization of research.

Over the last 20 years, academics have been experiencing a growing pressure to publish a large number of articles in top (often US-based) journals, which emphasize rigorous research designs and have a bias towards standard deductive approaches and quantitative methods (Godard, 2014; Whitfield and Strauss, 2000). As research evidence in industrial relations research typically consisted of detailed descriptions from the workplace, this new publishing trend has presented industrial relations researchers with great challenges. As the article by Fuchs et al. in this special issue clearly shows, research design in industrial relations research is often due to pragmatic choices and lucky coincidences related to access; furthermore, the process of entering the field is characterized by high uncertainty and risk of failure and can be as long (and even longer) than the data collection itself.

Therefore, trends in academic publishing penalize the fieldwork tradition of industrial relations research while they favour related but also competing disciplines like economics,

human resource management and organizational behaviour. As a consequence, in the last 20 years industrial relations research, too, has experienced a shift towards greater application of a deductive approach and increasing use of surveys and quantitative methods (Godard, 2014; Strauss and Whitfield, 2008). While the research output reflecting these trends may have gained in methodological rigour and external validity, what is lost is the insight coming from direct observation as well as the 'colourful, even arresting, descriptions that once were common in the industrial relations literature' (Strauss and Whitfield, 1998: 20). From this perspective, the research Giulio Regeni was conducting in Egypt is of great significance, and as guest editors we are delighted to host in this special issue articles written by early career scholars like him who have been conducting fieldwork on labour-related themes in China, Morocco and Tunisia.

But how to consider the specific risks of fieldwork research in non-democratic settings, that have been so violently brought to the fore by the torture and assassination of Giulio Regeni? Fieldwork research used to be seen as the adventure of intrepid researchers on their journey of discovery, and the responsibility for conducting rigorous and ethical research and for their health and safety was exclusively their own (Tapscott and Desai, 2015). Times have changed and research institutions are increasingly aware of potential risks for researchers and for research participants. They have been investing in training, developing ethics and safety standards, and setting up ethics and safety committees in charge of judging the risks and feasibility of research proposals on the basis of standardized protocols (Mateja and Strazzari, 2017).

This trend towards securitization has positive and negative features. On the positive side, it might increase the researchers' safety. On the negative side, it may favour more mainstream methodologies to the detriment of the diversity and innovativeness of research approaches, as projects need to be approved by research institutions and funders, which follow de-contextualized and relatively rigid standards (Mateja and Strazzari, 2017). A case in point is the exclusion of covert participant observation by the Academy of Management (Roulet et al., 2017).

Furthermore, as researchers are now required to provide detailed fieldwork and data management plans to research institutions and funders, they are forced to weigh in advance the cost and benefits of conducting research in risky and uncertain environments. As Anderson (2016) argues, researchers might feel they are compromising on academic freedom as they cannot follow their research wherever it takes them. In order to circumvent these bureaucratic hurdles and continue their research, scholars – mainly based in North American and European universities – have started subcontracting their data collection to local researchers, thus losing control over a critical stage like the fieldwork phase. However, this strategy raises further ethical questions as it implies shifting the risk onto inexperienced local researchers who work in uncertain conditions and are not covered by minimum safety standards (Mateja and Strazzari, 2017).

The debate on securitization we have briefly highlighted here is very much open and ongoing. It is clear that researchers and their institutions must take their duty of care most seriously, and rigorous prior expert assessment of the risks involved in research is required. At the same time, it is important to have an open debate about the consequences of standardized ethics and safety procedures for academic freedom and to monitor their impact on research in the years to come.

Conclusion

Democracy and trade unions have developed along parallel tracks, largely, if not always, as bedfellows. In the process, union democracy has sometimes been regarded as an indispensable prerequisite of democratization, at other times as a detraction from effective and responsible unionism. Unions, in turn, have not always lived up to the mission of unifying the interests of the working-class as a whole and have in some cases, in less favourable socio-political circumstances, fought rear-guard battles aimed at defending their core constituents only.

Currently, there are worrisome signs that unions and democracy may jointly be on a downward path. As workers shift their electoral allegiance from social democratic to new populist parties with nationalist and welfare-chauvinistic agendas, unions decline in organizational terms and their influence shrinks. Yet exactly the current difficulties of democratic polities offer trade unions an opportunity to reinvent themselves by filling widening gaps of representation, participation and legitimacy.

These new developments may occur first and foremost in countries struggling for democratization and in poorly organized sectors, i.e. in places outside the main focus of industrial relations research. Giulio Regeni was working on these themes when he was kidnapped, tortured and killed. Producing research on these frontier topics is a way of honouring his memory and advancing social science.

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