Trade union research from the standpoint of the subject: Worker's collective action from the perspective of Critical Psychology

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Abstract

Trade unions play a minor role in psychological research (Frieling & Klein, 2010). When done, psychological research on unions mostly consists of traditional questionnaires and attitude research. Innovative research on unions, at least in Germany, is predominantly carried out in the fields of political science and sociology. However, the question of whether or not one engages in unionism is a genuinely psychological one. From a critical psychological perspective on authority and exploitation, this topic is essential as unions constitute an action possibility for transcending individual coping strategies and jointly expanding one's power to shape one's own living conditions in business and society in solidarity. Critical psychology's concepts of pedagogical behavior and learning theory (Holzkamp, 1993) have been widely received in the union's educational work (e.g. Allespach, Hilbert & Wentzel, 2009), yet there remains little critical-psychological research on one's reasons for union engagement in relation to the amount of quantitative-psychological or sociological union research. Despite this, critical psychology may very well prove useful in this field. This article will present selected concepts, research methods, and union-related studies in the field of critical psychology, illustrating the cornerstones of "union research from the standpoint of the subject" and its benefits for union research in terms of a "science of de-submission" (Osterkamp, 2003). In doing so, the article provides an overview of critical psychologists' works on the reasons behind engagement in solidarity and unions, as well as showing the methodological shifts in union research offered by critical psychology.

Keywords
critical psychology; Kritische Psychologie; trade union; labor revitalization studies; action research; collective action

Introduction: Trade union research without a subject?[1]

Trade unions play a minor role in psychological research (Frieling & Klein, 2010). When done, psychological research on unions mostly consists of traditional questionnaires and attitude research (Klandermans, 1986; Bamberger et al., 1999). Critical psychology differs substantially from mainstream psychology in that it pursues the claim that the subjective perspectives and reasons for action of the persons concerned in the research should be developed as fully as possible and analyzed in their overall social contexts. From the point of view of critical psychology, potential insights in mainstream psychology-oriented trade union research are neglected if (a) due to their methodology, subjective forms of expression by wage earners or union members are limited to pre-formulated question components, and (b) if the self-view and world-view of the respondents is not considered in the overall societal context, and (c) recorded only as quantitative-statistical correlatives. Even if participants in questionnaire studies are understood by the researchers as societal beings, questionnaires generally only provide information about correlations between response components to contents of awareness (e.g. importance of trade unions) and 'socio-structural factors' (such as status in operation) (Schnabel & Wagner, 2005, Ebbinghaus & Visser, 1999). However, as Heiner Keupp (1987) notes, with regard to network research, social reality cannot be adequately dissected into individual operationalizable 'factors' without neglecting the entirety of social relationships. This is especially true when the social reality that has been dissected into 'factors' is "pieced together again in the methodological mechanics of its covariance" (ibid., p. 154). From the point of view of critical psychology, there is the danger that the inner connection between the objective (contradictory) reality, its individual interpretation, and the resulting actions becomes lost along the traditional psychological route. Psychological trade union research that is limited to questionnaires is therefore not very suitable "for self-enlightenment of the people about their societal and social dependencies" (Holzkamp, 1972, p. 32) or for contributing to their overcoming.

Trade union research in Germany is predominantly carried out in the fields of political science and sociology (Müller-Jentsch, 1997, Schroeder, 2014, Schmalz & Dörre, 2013). The question of why people become unionized seems to be recurrent in sociological and political scientific research (e.g. Ebbinghaus & Göbel, 2014, Müller-Jentsch, 1997, p. 119ff). In terms of methodology, however, these works are sometimes problematic: they adapt methods of psychological questionnaire research (e.g. Pyhel, 2008, Behr et al., 2013), which goes hand in

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hand with the cognitive limitations of traditional psychological trade union research (see above), or they use rationalistic rational choice approaches as a theoretical background (Müller-Jentsch, 1997, p. 119-123). In addition, sociological trade union research usually includes social and organizational processes – such as, for example, union organizing projects and their interactions with the institutional system of industrial relations – and not the experiences and reasons for action of those affected (e.g. Nachtwey & Thiel, 2014, Thünken, 2018). Moreover, as in quantitative-psychological trade union research, respondents are usually not involved in the discussion of the results or in drawing theoretical and practical conclusions.

Although a growing interest in the subjectivity of actors can be seen in German trade union revitalization research (e.g. Nachtwey & Wolf, 2013, Singe & Wolf, 2013), union research is not thoroughly and consistently carried out from the standpoint of the subject. Here, critical psychology's concepts of pedagogical behavior and learning theory (Holzkamp, 1993) are well received in German trade union educational work (Allespach, Hilbert & Wentzel, 2009, Allespach, 2015). Trade union involvement can provide an action possibility for wage earners to transcend individual coping strategies for unreasonable business and societal demands and jointly expand one's power to shape one's own living conditions in solidarity. If and why this is or is not the case is an open, empirical question to be clarified. Critical psychology, as will be shown, is an appropriate tool for this question.

To highlight the implied distinctiveness of critical-psychological trade union research, Table 1 compares it – in a deliberately pointed and simplified way – with purely quantitative-psychological and sociological trade union research.

Table 1: Comparison of subject-scientific trade union research

	Subject-scientific trade union research	**Quantitative-psychological trade union research**	**Sociological trade union research**
Object/Focus	Trade unions and the living environment, as experienced by the subject	Concept-based query of the phenomena of consciousness	Reconstruction of social and societal processes (institutionalized patterns of action, organizational rules and processes, societal processes of change)
Typical research aim	Practical reflection for those "concerned" and understanding union	Theory/concept development	Development of societal interpretative knowledge and/or strategy consultancy aimed at the trade union

	work		organization
Typical research addressee	Those concerned (wage-earners, active union members and full-time employees)	Scientific community	Those concerned and/or scientific community
Typical status of those concerned in the research process	Co-researchers	Data suppliers	Data suppliers
Preferred methods	Repertoire of qualitative, participatory research methods	Quantitative statistical questionnaire research	Expert interviews, questionnaires and social statistics
Examples	Held et al., 2011 Schmalstieg, 2015	Fullagar et al., 2004 Bamberger et al., 1999 Gall/Fiorito, 2012	Nicklich/Helfen, 2018 Ebbinghaus/Visser, 1999

In this article, this distinctiveness will be elaborated upon step by step. The aim is to present selected concepts, research methods, and thematically relevant studies in the field of critical psychology, in order to illustrate the cornerstones of trade union research in terms of a "science of de-submission" (Osterkamp, 2003).

1. Fundamental concepts: Motivation and agency

The distinctiveness of critical psychological methodology does not derive from favoring certain methods (e.g. interviews) or methodological orientations (qualitative vs. quantitative), "but rather from the categorical and consequent methodological determinations" (Markard, 2015, p. 171). In other words, critical-psychological union research is based on an elaborate "subject concept".

In general, critical psychology starts from individual societality. This is the result of natural history development (e.g. Holzkamp, 1983). Human beings are the only species that "from adaptation to existing circumstances [have] moved to a mode of existence of cooperative production through labor" (Maiers, 1996, p. 173). Human beings live under social conditions which they themselves (re-)produce.

Societal conditions therefore represent an ensemble of possibilities for and impediments to action for the individual, according to which one can behave. A human being is conceived as a *subject,* which is not determined by external living conditions, but is also not independent. An action is "for *me*, as the subject, always based on my *humanly*-designated needs situation" (Holzkamp 1983, p. 350). When workers do not organize themselves in trade unions in order to

remedy their dissatisfaction, it is neither irrational nor caused by restrictive living conditions. Objective-economic (living) conditions are perceived by the individual from his life situation and position. This view of the world forms the *premises* of individual action. The conditions accentuated in this way are called *meanings* and constitute the *subjective scope of possibility* of the individual. From the point of view of the subject, the central critical-psychological unit of analysis is *premises-reasons relations* "in the breakdown of which the psyche is to be understood from the mediation relationship between societal and individual life acquisition" (Markard, 2015, p. 54).

This "mediation relationship" between subject and world is captured by the central critical-psychological category of *agency*. An individual develops personal agency through the control that "an individual has of his or her own conditions of life through participation in the generalized control of the societal process" (Holzkamp, 1983, p. 241). Trade union organizational offerings are therefore to be understood as a way of securing or broadening their own agency.

Holzkamp (1983) differentiates between *restrictive* and *generalized* agency: These two polar points of the term depict the contradictory nature of life experiences in the context of capitalist socialization. They raise the question as to how far "in an attempt to cope with life/handle threats, contradictorily one's own generalizable life interests are simultaneously violated" (Holzkamp, 1990, p. 38). According to Holzkamp, restrictive agency is a certain way of coping with life, which consists of arranging oneself with the dominant conditions and powers, thereby displacing the self-destructive consequences that lie within them (ibid.). In restrictive mode, I always gain my agency under acceptance of the dominant conditions of action. In generalized mode, I develop my agency by disposing of or changing societal conditions – potentially in solidarity with others (Holzkamp, 1983, p. 367-369).

In their study on solidarity orientations and practices of young workers in the service sector, Josef Held et al. (2011, p. 27-29) describe the restrictive mode as *coping action* and the generalized as a *resistive engagement*.

Emotion, motivation, and cognition are understood as aspects of individual agency (detailed in Holzkamp, 1983, Chap. 3). Motivation refers to the subjective willingness to exert effort in order to preserve or broaden one's own agency in perspective. Motivated action can only exist if three conditions are fulfilled: (1) the connection between individual action and the safeguarding or expansion of one's own agency exists objectively; (2) this relationship is adequately represented in societal forms of thought; and (3) it is recorded individually (Holzkamp, 1983, p. 299f). An individual has to cope with the so-called *motivation contradiction:* namely the contradiction between the emotional evaluation of future agency and the emotional evaluation of the expected efforts

and risks along the way. This motivation contradiction is to be regarded as a central topic of trade union research from the standpoint of the subject because workers depend on their social position as wage-*dependents* to earn a living by selling their labor power. Questioning the status quo through trade union participation is a fundamentally conflict-laden and exhausting undertaking.

Critical-psychological trade union research does not focus on wage earners, but rather on the world as experienced by them. The central issue is the "subjective meaning" of trade unions and trade union courses of action. The question is how this part of everyday reality is perceived depending on the individual situation, available interpretations of society, and action possibilities (Osterkamp, 2001, p. 8).

Purely quantitative-psychological trade union research typically deals with psychological concepts (such as union commitment) that represent subjectivity in an ambiguous way and their correlation with other psychological concepts or socio-economic variables. By contrast, sociological trade union research typically focuses on the reconstruction of societal processes (e.g. union strategies and union organizing processes).

2. Dimensions of trade union action: Collective action, resistance, solidarity

Catharina Schmalstieg (2008, 2015) has significantly contributed to making critical psychology beneficial for trade union research. She coined the term "unions as a platform for action":

> "Trade unions can [...] act as a platform for action by introducing individuals' collective actions into unionism, conveying information and knowledge, and shifting individual anxiety and frustration away from isolation into organized collective action." (2008, p. 144)

To further understand the specifics of individual action on this "platform", it is necessary to refer to a conceptual distinction made by Lucie Billmann and Josef Held (2013). Within individual coping action, they distinguish between three forms of engagement, which aim at a liberation from coercion and domination: collective action, resistance, and solidarity.

According to them, *collective action* is characterized by common goals and interests, with which a large number of people work simultaneously (ibid., p. 21). How these interests are formulated is part of a stand-alone analysis that focuses on why and in what way unionists in collective action have formulated shared

interests. The question is whether the common interests are "oriented towards general interests or merely represent common partial interests" (Holzkamp, 1980, p. 211). After all, collective action can also be an expression of regressive movements. One example is right-wing extremist organizations (see Marvakis, 2013). Trade union organizations can also serve partial interests, for example, in supporting ecologically hazardous technologies or moderate wage demands to safeguard national competitiveness. In contrast, collective action in the sense of generalized agency is to be understood as "a directional determination" (Holzkamp, 1980, p. 211), which contains a utopian element – namely the search for action possibilities free of social coercion and domination:

> "The general interest is largely determined by the fact that, on the whole, it cannot be directed against the interests of certain persons or groups. The general interest is therefore always – as it becomes more concrete – an interest in overcoming human being's oppression of human beings, i.e. directed towards the disposition of the people over their own affairs, so that they do not subject themselves to foreign contrary interests and want to surrender to the arbitrariness of the powerful. One can summarize this as follows: The only interest that can be identified as a general interest is the interest in freedom, which is thus mankind's greatest possession. [...] Contrary to the specific interest of oppression, the universality of the interest of freedom is by no means restricted, but only a condition of the enforcement of the universal, because the fight against oppression unavoidably involves the fight against the oppressors." (p. 210f)

If freedom is understood as a "conscious collective disposition over one's own affairs" (ibid., p. 212), then collective action in the general interest is always a resistant action against restrictive social structures and normative requirements.

As *resistance* can also be practiced individually, it must be conceptually differentiated from collective action. According to Billmann and Held (2013, p. 23f), resistance is characteristic of "following one's own needs and intentions, which are contrary to external demands". Trade union action articulates itself against requirements in business and society and is thus resistant action in collective form. Individual forms of resistant action must therefore be regarded as the nucleus of trade union action. The history of the working-class movement is familiar with a large number of such practices (see Thompson, 1980, Hobsbawm, 1964, Müller-Jentsch, 2008, p. 99ff).

According to Billmann and Held (2013, p. 24f), *solidarity* is distinguished from oppositional and collective action by emphasizing social relationships and emotions. Solidary action with common interests is considerably based on social bonding emotions (such as care and friendship). Solidary action with different

interests is based on empathy, compassion, and recognition. The latter depends very much on taking over the perspective of those with whom I act in solidarity. Solidary engagement with regard to divergent interests does not focus on expanding one's own agency, but rather the agency of others. Even in the case of oppositional and solidary action, from the point of view of critical psychology, one must ask to what extent it serves the general interest or is guided by specific interests.

Trade union action is composed of all three modes of action. It involves participation in an organization whose foundation is the collective *and* solidary engagement of various groups of wage earners in order to organize their resistance against the 'employers'. It is not only actions, such as the collective refusal to work or the participation in rallies, that express the collective solidarity character. Even in cases of largely passive memberships, consisting of nothing more than paying a monthly fee, there is still a degree of solidarity and collective action.

Resistance, solidarity, and collective action among or between wage earners can also take place independently of trade unions (see Müller-Jentsch, 1997, p. 34ff, Silver, 2003). However, in these cases, it assumes a quasi-union character. Furthermore, in many cases, such forms of action (such as, slowdown strikes) are pre-forms of trade union action. In short, the "action platform" union offers the possibility to convert individually resistant action into collective action, which benefits a more or less far-reaching conceived solidarity network.

3. The 'justification logic' of trade union action

In her study on unionization of precarious workers in the US security sector, Schmalstieg (2015, pp. 155-162) distinguishes between three basic patterns of dealing with trade union courses of action. The approaches range from active acceptance (1), to overcautious interest (2), to rejection (3). She differentiates the basic pattern of 'rejection' from 'strong rejection' (3a) and 'lack of interest' (3b): "The reasons for this are manifold, and the spectrum of rejection ranges from other priorities, to bad experiences with other unions and mistrust, to great fear" (2015, p. 156). In addition, some employees simply had no knowledge of the trade union offerings because the union's efforts of communication did not reach them. At this point, I would like to focus on the pattern of active trade union engagement. [2] The willingness for trade union action from wage earners can, in

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[2] As far as motivational psychology is concerned, trade union action of full-time employees is different from that of personnel and members. The former live from the organization; in a way, they embody the organization. Even though they play a central

my opinion, be analytically itemized into six psycho-logical dynamics. To reconstruct this 'justification logic' of trade union action, I refer to Schmalstieg (2008, 2015, pp. 237-245), Billmann and Held (2011), and supplement elements from *Mobilization Theory* by John Kelly (1998).[3]

1. Dissatisfaction with the status quo: The starting point of trade union action is a feeling of dissatisfaction. This presupposes that the individual recognizes and acknowledges his or her own or others' needs and ultimately comes to the conclusion that they cannot be realized under the given circumstances of life – in business and/or society. The dissatisfaction *in* the status quo becomes the dissatisfaction *with* the status quo.

2. Collectively shared injustice: By recourse to subjectively important (justice) standards, needs can be legitimized and transformed into a consciousness of injustice. Unless this injustice is understood as a collectively shared circumstance, individually resistive action, at most, is conceivable, in addition to various forms of coping action. The recognition of a common situation, however, is not a given, but rather must be understood by a corresponding interpretation of the living conditions. Collective (trade union) actions, spaces of understanding, and community-building symbols can promote this process of recognition and thus counteract individualistic orientations, divisive differentiations, and hierarchies between different workforce or wage-dependent groups (e.g. through racism or sexism) (Schmalstieg, 2008, 2015, p. 238ff).

3. Responsibility and changeability: For a collective action, it is necessary that the situation recognized as unfair be experienced as fundamentally changeable. An actor must be held accountable for this situation on or against which trade union action can be directed (see Kelly, 1998, p. 30).

4. Collective action possibilities and effectiveness: Unless alternative *collective* action possibilities are subjectively identifiable with the previous courses of action, individual exit or resistance strategies may remain. If alternative interpretation patterns convey collective options for action, then the goals associated with them must not only be considered meaningful/desirable, but also as enforceable/realistic and conclusive, beyond broadening personal agency. It therefore requires the assessment of collective effectiveness.

5. Motivation contradiction: Collective options for action are justifiably motivated only when the above-mentioned motivation contradiction is resolved

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role in organizing processes, they are not included here. Trade union action therefore initially only means that of the members.

[3] With this approach, Kelly provides an explanation of how collective action emerges from workers. In his *Mobilization Theory* he integrates concepts from various strands in the field of social movement theories and the social psychology of protest (see Tilly, 1978, McAdam, 1988, Gamson, 1992, Klandermans, 1997).

in favor of collective practices – that is, when the subjective evaluation of future quality of life outweighs the efforts and risks of the journey. The risk that the initial level of individual agency could be jeopardized by the envisaged "conflict with those in power" (Holzkamp, 1983, p. 378) is the logical basis for the foundation of restrictive agency. It therefore requires the (self-)understanding of the dangers underlying the fears (e.g. threats of dismissal).

Abstract appeals to individual courage, or similar qualities, tend to displace the real problem from the perspective of the subject. Therefore, what is required instead are: a) collective strategies to jointly reflect fears and minimize individual dangers and b) graduated courses of action and related interpretation and knowledge offers (e.g. in the field of labor law). Collective courses of action must therefore be experienced from the perspective of the subject as not only meaningful, conclusive, and realistic/enforceable, but they must also be "worth it", in order to accept any negative consequences. This also means that other action possibilities could not be carried out or not to the desired extent. Since trade union action forms part of one's own way of coping with life (see Held et al., 2011, p. 32f, Hillebrand, 2012), ultimately each individual must evaluate different fields of action for themselves. For this reason, trade union action can be individualized. For example, it can be put on hold in favor of other organizations or help in the family environment, although the range of trade union courses of action still seems just as significant, coherent, and realistic.

6. Experience of collective action/effectiveness - Premise update:

In practice, the extent to which union action has actually made it possible to change one's own living conditions ultimately becomes clear. Depending on this, an update or review of the action premises is necessary. Individually, questions arise, such as: Did my dissatisfaction come to an end? Have my needs changed? Do you need further or other collective action to become collectively effective?

The motivation contradiction is updated depending on the extent to which the expectation of an expansion of agency is fulfilled or becomes doubtful, from the point of view of the subjects – be it either because the goals of the trade union organization have strayed from their interests or vice versa; the opposing power built up by trade union action, contrary to expectation, is not sufficient; or the individual risks are rising or falling short of the status quo, etc.

This 'justification logic' is not to be understood as a linear process, but as an *ideal-typical reconstruction* of psycho-logical based thought/action steps.[4] It

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[4] This reconstruction focuses on the subjective requirements of trade union action. According to Kelly (1998, 2005, p. 502), further processes are necessary for successful implicit trade union action, some of which were implicitly assumed in the reconstruction: a) a resource-mobilizing trade union organization, b) a trade union leadership (group), which is prepared for collective mobilization, c) a favorable balance of power, d) an opportunity for mobilization. These prerequisites make it clear why the

should be noted that trade union action can certainly also be carried out for reasons that are not aimed at a generalizable expansion of agency, for example, if the reason is to succumb to the peer pressure of colleagues.[5] Another reason for becoming a union member is to become eligible for membership bonuses – ranging from union services, such as legal protection, to collectively agreed benefits of members compared to non-members. In this sense, the ideal-typical reconstruction outlined above is one of several possible reason patterns for why people become union members.

Each logical step in this ideal-typical reason pattern is a *process* in itself. For example, in the course of a trade union campaign, experiences of collegial solidarity are accumulated, which may alter the assessment of collective agency or the expectation of positive or negative consequences. Other actors, such as business owners and the state, are entering the debate with new interpretation patterns and possible sanctions. These processes continue, just as each and every one of the participants, in the context of his or her – changeable – life situation, is continually able to regain his or her relationship with the trade union courses of action and draw new conclusions.[6]

This is followed by an important conclusion formulated by Held (2016) on the basis of the aforementioned research project on solidarity understanding of employees in social services:

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psychological explanation of trade union action or labor disputes is not only understandable from the analysis of the work situation, but is communicated to the whole of society. For example, favorable opportunities and the balance of power between workers on the one hand and 'employers' and the state on the other hand, or hegemony also strongly influence regional and historical mobilization-promoting forms of thinking. Thus, protest cycles and high-profile social movements can encourage individuals to resist or act in solidarity.

[5] This reasoning is referred to in the purely quantitative-psychological study by Bert Klandermans (1984) as 'social reward' and includes expectations about the positive/negative reactions of relevant significant others. This is one of several important 'variables' that explain willingness to participate in union action.

[6] To explain the individual willingness to participate in trade union action, relatively solid individual orientations (not: attitudes) must be taken into account. These orientations must be understood in the light of a specific historical context, as well as social orientation offers (see Held, 2016, for the definition of the term 'orientation' and its distinction from the traditional-psychological term 'attitude', Held 2015, see also Markard, 1991). In other words, from the point of view of critical psychology, biographical and/or family-mediated experiences can lead to orientations that favor or inhibit trade union engagement (see the example of committed trade unionists: Hillebrand, 2012). However, such orientations vary considerably. Here, not only subjective contradictions and problems play a role, but also whether the individual has alternative courses of thought and action available.

> "Overall, it can be stated [...] that solidarity is not a general socialization product, that it is not a personality trait – and that it is not self-evident, but that it arises in practice. Practical experience is therefore, above all, the precondition for a solidary stance, for solidary engagement, and for solidarity in action. In practice, this does not only refer to resistant action in operation, but rather action on site overall." (p. 176, see also Held/Billmann, 2014)

In my opinion, this statement applies not only to solidarity, but also to individual willingness to act within trade unions.

Lack of motivation for trade union action: Manifestations of restrictive agency

A critical-psychological analysis has to pay attention to the reasons for trade union action in its overall social context, as well as broken or lack of motivation. Primarily it is not about "attitude issues or whether there is a 'will' to change. Rather, the 'terrain' of the potential space of collective action must be taken into account (see Fantasia, 1988, p. 227), which in addition to trade union courses of action always includes intimidation, threats, and sanctions on the part of companies and other living conditions" (Schmalstieg, 2015, p. 223). This can also include courses of action "for participation in the power of the rulers" (Holzkamp, 1983, 375): "Here, the arrangement with the rulers thus includes the attempt of participation in their power to secure/expand their own agency at the expense of foreign interests, in which the suppression from 'above' is passed 'down' in a variety of ways to those at whose expense their own partial interests are to be enforced" (ibid.). Cooptation offers (e.g. bonus payments for non-membership) are a typical fission tool which employers use to prevent trade union action of their workforce (see Penney, 2004, Dörre et al., 2017, p. 123ff).

For illustrative purposes, some potential psychological manifestations of restrictive agency are described below (see Held et al., 2011, pp. 141-145, Holzkamp, 1983, Chap. 7.5). These are potential aspects of the subjective justification for not participating in a trade union, although the possibility for participation exists:

- *Interpreting* is often associated with: the suppression or repression of unjust structures (right up to the "belief in a just world"); a tendency to subordinate oneself to authorities and to follow accepted rules without question (authoritarianism); the belief that you are always responsible for your own well-being (self-orientation); static thinking instead of developmental thinking.

- *Restrictive emotionality* is often associated with: dissociation of emotions from the real cognized living conditions; internalization or purposeful control of the emotions; comparison of 'feeling' and 'understanding'.
- *Internalized compulsion* is often associated with: supposedly purely subjective discomfort and individual techniques for 'motivating' oneself (see Holzkamp, 1983, p. 402ff).

In her case study on the organization of precarious workers, Schmalstieg (2015) comes to the conclusion that, for various reasons, union activists have a hard time motivating their colleagues to engage in trade union work: they must argue against solidified orientation patterns, against corporate propaganda, and against societal hegemonic discourse, all of which suggest individualized strategies for coping with life and conflict resolution: "The [colleagues'] feelings of being threatened cannot be 'discussed away' in view of the abundance of precarious risks and constantly threatened agency, the discussions must be conducted continuously and arguments must be substantiated with results" (ibid.: p. 162). According to Schmalstieg, a full understanding of the action orientations of precarious workers only becomes possible if one considers that precarity depends on the entire life situation. Therefore, in trade union research from the standpoint of the subject, the living conditions of the respondents should be given full attention – not least the housing conditions, the family reproductive arrangements, or the accessibility to public infrastructures (ibid.: p. 221-223).

Agency through trade union action in the conflict area of available expansions and restrictions

Whether and to what extent the trade union platform is rated as a subjectively important expansion of personal agency in a concrete case is to be determined empirically. The expansion of agency need not be exhausted in the improvements of living and working conditions, but may also include the expansion of skills, knowledge, or social inclusion. This can also include an increased self-confidence and confidence in the variability of living/working conditions. This can even apply to employees who are not unionized because they indirectly learn something about their rights and thus learn to better assess their objective scope of possibility (Schmalstieg, 2015, p. 164f, see also Markowitz, 2000).

Critical-psychological trade union research analyzes trade union action offerings as a *conflict area between expanded courses of action* and *subjective problems*. Problems with the 'action offer' may explain some manifestations of broken motivation for union action. Such problems include the disregard for worker participation wishes of those affected or the overburdening of individual skills. Depending on the nature of the problem and the individually perceived

reaction possibilities, various actions are justified: From loss of motivation (withdrawal), to "learning loops" (Holzkamp, 1993), to resistance to one's own trade union organization (for exemplary sociological case studies on the subject see Markowitz, 2000, Simms, 2006, Nachtwey/Thiel, 2014).

This conflict area is associated with a typical contradiction in the practice of trade union work, namely that between *leadership* on the one hand and individual *worker participation* in trade union activities and goals on the other (Schmalstieg, 2015, pp. 246-251). This is the consequence of the fact that the trade union is an "organized form" (Holzkamp, 1983, p. 414) and thus brings with it action constraints. Critical-psychological analyses therefore have to keep an eye on subjective skills for worker participation, as well as the subjective significance of bureaucratic processes in the trade union organization.

4. Methodological consequences of trade union research from the standpoint of the subject

In a review of trade union research deficits, Gregor Gall and Jack Fiorito (2012, p. 718) claim that "studies should construct their research sites as foremost being the psyche of individual workers in order to better examine the potential variability of motivations (and configurations thereof) that lead to the same outcome and the contribution of social relationships and processes with other workers to that process." This is where critical-psychological trade union research begins, but what Gall and Fiorito suggest is primarily a quantitative-psychological research paradigm, which ends with the cause-effect relationship of various correlated concepts that should 'represent' consciousness and behavioral phenomena – such as the statistical connection between 'union commitment' and 'union participation'. Their method of choice is therefore standardized questionnaire studies.

The choice of the concrete method of collecting and evaluating trade union research from the standpoint of the subject must correspond to the above-described critical-psychological understanding of object matter. The method must be tailored to the specific question. This question ideally arises from the subjectively relevant problems of those affected. Qualitative survey methods – such as open structured interviews, participatory observation, or group discussions – are often the method of choice, but – taking methodological suitability into account – can also be combined with quantitative methods (for considerations on the possible combinations see: Held, 1994, Bibouche/Held, 2002, for an implementation in the context of trade union research see: Held et al., 2011, Held/Billmann, 2014).

In order to take into account the fact that people not only live under specific life circumstances, but also (re-)produce them through their actions, a form of action research suggests itself. In this, recognition is closely linked to the changing of one's own life practice. Ideally, the participants do not have the status of research objects and passive data providers, but instead become active in the research process – as co-researchers (see Markard, 2009, pp. 274-277). In a critical-psychological action research project, Ute Buggeln (2015) investigated and influenced the reform process of a branch of IG Metall. Along the way, she was able to work with various full-time and volunteer trade unionists to identify blockages and scopes of possibility for participation-oriented consensus-building and decision-making processes in the branch.

In the context of critical psychology, we can also draw on analyses that do not have a direct reference to action and change. From the point of view of temporary agency workers, Jan Aleith (2010) examines what prevents regular employees, employee representatives, and temporary agency workers from working together in solidarity for better living and working conditions (see also Aleith/Barf 2015). The investigation on "solidarity ideas" of young service workers is just as informative for trade union practice (Held et al., 2011) as the elaboration of five ideal-typical ways of dealing with social workers with their neoliberally restructured paid work (Eichinger, 2009). All three studies uncover subjective motivations and norms that can be useful for union practice of full-time and voluntary unionists. This is because they show barriers to collective action and solidarity which should be taken into account in trade union strategies; they uncover individual practices that are resistant to employer demands and that can be transformed into collective union actions; they expose subjectively highly significant professional standards that cannot be realized under working conditions, which could make them the linchpin of a union campaign; and, they reveal contradictions in the coping action of workers, to which alternative – 'destabilizing' the adaptation to the prevailing conditions – trade union interpretation offers can build on.

There are also two other critical psychological studies that give impetus for the reform of trade union organizations: The study by Julika Bürgin (2012) examines the demands on workers who face new forms of work in trade union education, such as indirect control. Bürgin shows that, far from relaying a fixed body of knowledge, there is a great need among the interviewees to communicate on their own work conflicts, dilemmas of collective action, and risky individual coping strategies. From a biographical angle, Katrin Hillebrand (2012) reconstructs the motives for trade union engagement of five female union members. In doing so, she uncovers androcentric aspects that hinder women's involvement in trade unions (such as the sanctioning of atypical behavior or the

lack of attention paid to the inequality of private care work between the genders) in the trade union organization and culture. She then discusses reformative steps (such as the establishment of women's networks, mentoring projects, and new forms of participation).

The works of Nora Räthzel and her colleagues, who are inspired by critical psychology, are also worth mentioning. For example, they analyze the labor regimes, gender relations, and workplace practices of trade union representatives from the perspective of workers in various plants of the car manufacturer Volvo (see Mulinari et al., 2011, Rätzhel et al., 2008, 2014). In a recent study, they conduct biographical interviews with ecologically-minded trade unionists to investigate "the biographical circumstances under which individuals are able to work with environmental issues in unions. The analysis shows that the conditions for integrating environmental issues are weakened by the hierarchical culture of the organization and by high levels of institutionalization" (Lundström et al., 2015, p. 166). Finally, the qualitative evaluation of two organizing projects of the United Services Trade Union by Marcel Thiel (2013) should be mentioned. The study is not an evaluation carried out solely from the point of view of the persons concerned but, for the evaluation of the projects, the author also inquired about the assessment criteria of important union activists and highlighted conflict areas according to the demands and experiences of the activists and the process of the projects.

It should now be clear: in union research from the standpoint of the subject, theories and concepts are bound to action problems. While quantitative-psychological trade union research is typically aimed at "abstract theoretical tests," critical-psychological trade union research aims to "reformulate immediate ideas and perspectives in such a way that other courses of action become conceivable. (...) The case-related critical-psychological research does not rule out the use of concepts developed beforehand, nor that theoretical work is carried out on a case-by-case basis or in the absence of specific cases. Their theoretical as well as practical relevance, however, cannot be separated from the associated possibilities of individual and societal emancipation" (Markard, 2009, p. 298f).

Are traditional-psychological or sociological theories and studies meaningless for such union research? The aim of critical psychology is to subject these theories and studies to criticism and to work out potential premises-reasons-relations. For example, sociological studies may describe the objective reality in trade unions or organizational processes, highlighting that a participatory organizing project involves significant membership growth and participation in union activities. To elicit the subjective significance of these courses of action would, as already mentioned, be critical psychology's objective. Its purpose is to identify why people opt for membership and participation, and

why others simultaneously choose not to do so. In addition, statistical correlations from sociological or quantitative-psychological research can be the starting point of a critical-psychological study, for example, to examine the statistical relationship between unemployment and union withdrawal. Such correlations, however, should not be regarded as "statistically-inductive explanations […], but merely as descriptions of a fact requiring explanation" (Kempf, 1992, p. 106). Qualitative data would clarify correlative relationships without, however, being subjected to the misunderstanding that this means statements about single individuals become possible. Thus, from the perspective of the subject, there are quite different "good reasons" for remaining in the union despite unemployment, or for withdrawing on the occasion of unemployment.

5. Conclusion

Trade unions and union organizing are the subject of countless publications. Compared to the amount of quantitative-psychological and sociological studies, there has been little critical-psychological trade union research so far. This is regrettable because critical psychology, in my view, provides the necessary conceptual tools to clarify the question of whether or not wage earners organize themselves into unions and more or less engage as members. The aim of the article was to prove this. For this reason, the terms and methodological cornerstones of such research, as well as relevant critical psychological studies, were presented. This laid the foundations for practice-oriented trade union research with the help of critical psychology.

The next step involves the reinterpretation of existing theories and studies on the reasons for action in trade union engagement on this basis. The reasons for union involvement or engagement are discussed in numerous studies in the field of traditional psychological or sociological trade union research. The statements articulated therein would then have to be questioned as to whether implicit premises-reasons-relations are hidden in them (see Holzkamp, 1986) or whether they theorize the question about reasons for union action in an inadequate manner. For example, they would be inadequate, from the point of view of critical psychology, if the orientations of wage earners a) are detached from their life contexts and thus solipsistically curtailed, or b) are derived from societal structures. Thus, declarations of union abstinence of many workers who emphasize "individualization" as macro-societal development should also be dismissed as curtailments, just like the theorizing of workers as individual cost-benefit maximizers who wondered what monetary value they received from services for their union contribution.

At the same time, such a reinterpretation must recognize the relative gain in knowledge and the practical relevance of quantitative-psychological and sociological trade union studies. In Germany, for example, following the Labor Revitalization Studies and the Public Sociology debate, sociological trade union research that is oriented towards dialog and practical relevance for full-time and voluntary trade unionists has developed (Urban, 2015, Dörre, 2017). Within this framework, innovative trade union strategies such as organizing projects and relatively spontaneously initiated unionization processes were examined (see, e.g., Dörre et al., 2017, Schmalz/Dörre, 2013). Here, not only were the organizational strategies and tactics and their sociological effects reconstructed, but also – albeit relatively unsystematically – reasons why workers organize or worries from the employee's point of view were outlined. The article concludes by asserting that a productive interplay of the three outlined trade union research methods not only forms the basis for better understanding of trade union action by individuals, but also paves the way for more emancipatory trade union practice. Such a practice can be described as "comprehensive" or "understanding trade union work" (Schmalstieg, 2015, pp. 233-236):

> "'Understanding trade union work' or, better, 'understanding membership work' aims at the reason patterns, motivation and needs of the members, which are thought of and anticipated in the context of institutional and societal action possibilities." (pp. 235-236)

For practitioners, this would mean trade union work that explores the reason patterns of the addressees of trade union offerings in order to understand their reasons for action and to then develop courses of action and forms of thought that offer alternatives, in the general interest, to settling into the status quo. Such an understanding of union work would not be limited to encouraging resistance and collective solidarity in action at the corporate level. Rather, it would also pursue the aim of providing possible interpretations and courses of action in the general interest with regard to *societal* processes. In the face of stronger right-wing populism and the spread of exclusively-solidaristic attitudes in the workforce, this is a most urgent task.

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