

# From Transformation to Revitalization: A New Research Agenda for a Contested Global Economy

*Lowell Turner*

Building on and moving beyond the transformation of industrial relations literature of the 1980s and 1990s (Kochan, Katz, & McKersie, 1986), another body of work has risen in visibility in recent years in response to contemporary realities. This labor movement revitalization literature addresses above all the urgency of innovative union strategies in the face of dramatically worsening international and domestic conditions. These include a long-term decline in union membership and influence, relentlessly growing inequality at home and abroad, the dominance of economic policies that undermine labor, environmental and human rights standards, and the challenges that all of the above pose to the vitality of political and economic democracy.

Today's high-stakes battles take shape across a wide range of local, national, and global arenas. If postwar industrial relations literature in the United States focused on system stability through the 1970s, that era is long gone. Subsequent analysis has emphasized union decline, industrial restructuring and labor-management partnership. Revitalization literature, by contrast, has emerged into the mainstream to reflect mobilization-based initiatives aimed at renewing union influence (Bronfenbrenner, Friedman, Hurd, Oswald, & Seeber, 1998; Cornfield & McCammon, 2003; Nissen, 2002; Turner, Katz, & Hurd, 2001). The election of reform forces at the American Federation of Labor-Congress of Industrial Organizations (AFL-CIO) in 1995 and the continuing prominence of a few organizing unions has called forth new empirical, conceptual, and theoretical approaches on the part of labor researchers. In other countries across the global North and South alike, union revitalization initiatives—or the burning need for such efforts—have likewise inspired new research and analysis.

The revitalization perspective is hardly new. With deep roots in both labor movement history and industrial relations research, such work was marginalized for much of the postwar period both in union strategy and in the field of industrial relations. What is new is the rather sudden arrival of revitalization research in the mainstream of industrial relations along with a broader literature on contentious politics in a global economy (e.g., Klein, 2002; Delia Porta & Tarrow, 2004). This introductory article offers an overview of the revitalization perspective, deepened in relevance by contemporary struggles for democratic representation in the modern workplace and beyond.

Subsequent articles in this special issue of *Work and Occupations* present research-based examples of recent work focused on labor movement renewal, from a talented interdisciplinary group of contemporary labor researchers. Although this introduction and the articles by Kate Bronfenbrenner and Stephanie Luce mainly address labor issues in the United States, the articles by Ralph Armbruster-Sandoval, Jennifer Chun, and Christian Levesque, Gregor Murray, and Stephane Le Queux expand the analysis to the global arena.

## The Argument: Union Strategies Matter

There are two central arguments in the revitalization literature. The first is that contemporary circumstances provide openings for, and in some cases are driving, innovative, proactive, and quite promising union strategies for renewal of influence in changing world, national, and local conditions. The second is that such strategies matter: They have been and continue to be instrumental in promoting workplace, social, and political change, and they contain as well the potential for substantial breakthroughs in labor movement and broader democratic revitalization.

Union strategies, in other words, can be analyzed both as dependent and independent variables. In the first instance, the emergence of innovative union strategies at the heart of the labor movement is driven by factors such as growing inequality, relentless employer hostility, the collapse of business unionism, globalization, privatization, antiunion government policy, ineffective labor law, new or reformed union leadership, openings in the political opportunity structure (such as crises of corporate corruption and failed trade negotiations), and growing relationships with allies in human rights, environmental, global justice, and other social movements. The task for research is to sort out the relevant importance of such factors, to shine analytical light on decisive causal forces driving, or blocking, the emergence of innovative strategies.

One argument, for example, might locate the development of innovative union strategies in the United States in the following causal process. Chronic business union failure reached a tipping point in the 1990s, opening the door for new activist-minded leadership (Hurd, 1998; Kelber, 1999). Matched surprisingly in a period of social movement fermentation by an expansion of willing coalition partners in other social and political groups (to wit: the battle of Seattle in 1999), union leaders and activists promoted innovative, mobilization-based strategies.

In the second instance (*union strategies* as an independent variable), innovative strategies result in a variety of outcomes: success and failure, progress and shortcomings, labor movement revitalization or its absence. Specific outcomes—including best practice cases such as expanded union influence in Los Angeles—can be identified and explained, as can aggregate outcomes at national and even global levels. Sorting out the causal forces at work requires assessing the impact of particular union strategies as well as other constraining and facilitating factors, social, political and economic. In the many cases where unions fail to innovate, similar or contrasting outcomes must also be explained, to fill out the picture and complete the causal analysis.

In both sets of argumentation, union strategies are prominent—as well they should be in a turbulent world in which collective actors struggle against economic, political, and institutional constraints. As progressive social forces strive to reassert themselves in polarized economic and political circumstances, so too does human agency as an analytical concept in a sea of social science still dominated by determinist analysis—from the "iron law of oligarchy" and market-driven "creative destruction" to the institutional determinism in varieties of capitalism (Hall & Soskice, 2001; Michels, 1962; Schumpeter, 1954).

To extend the argument, revitalization offers a new framework for measuring the value of a wide variety of labor-related policy issues and research. Topics such as alternative dispute

resolution, collective bargaining innovation, workplace flexibility, employee involvement, and labor-management partnerships are worthy of study in and of themselves. Beyond single-issue importance, however, the revitalization perspective places at the center of analysis the extent to which such processes contribute to labor movement renewal. Are they reforms or adaptations that improve circumstances for some in a broader context of union decline and growing inequality? Do they offer enduring workplace rights and representation, or do they only ameliorate some inefficiencies or unfairness in an increasingly employer-dominated and undemocratic world economy? Revitalization theorists would maintain that in the long run bargained or litigated reforms will wither in the absence of collective representation that is both strong and independent. For meaningful economic reform and democratic voice, a sustained resurgence of union influence is arguably a necessary condition and a template against which the broad social value of specific labor reforms and remedies can be assessed.

### **Defining Revitalization**

One task of a new research agenda is to develop common definitions of core concepts such as *revitalization* and *strategic innovation*. Although academics love redefinitions and terminology innovation, such efforts often generate more confusion than clarity. Clear, useful definitions should develop in trial-and-error processes of inductive and deductive reasoning grounded in research and analysis. Sensible definitions, in other words, should not be imposed from the academic heights but rather developed in the collective efforts of many scholars working on the frontiers of research. In this spirit, here are some suggestions.

Union strategies can be understood as more or less coherent overall organizational plans, implemented in pursuit of agreed-on goals. Innovative internal strategies focus on substantial organizational reform. The purpose is typically to restructure for efficiency or changing priorities, including rank-and-file mobilization, the expansion or suppression of democratic participation, and improvements in service provision and organizing effort (Behrens, Hurd, & Waddington, 2004).

Innovative internal strategies are in most cases a necessary (if too often ignored) prerequisite for successful innovation in external strategy—from organizing and politics to coalition building and international solidarity (Fletcher & Hurd, 2001). Like their internal counterparts, external strategies can be more or less innovative or traditional, aimed at broad or narrow goals. They can be top-down, bottom-up or both, in harmony or conflict with one another. Strategies differ from tactics in the commonly accepted sense (for both social science and military usage): *Tactics* refer to particular initiatives designed to further chosen strategy. If organizing, for example, is a strategic priority, then tactical choices range from handing out leaflets and house calls to rank-and-file leadership committees and the specific elements of a comprehensive campaign.

An overall goal of innovative union strategies in the present era is labor movement revitalization. The concept clearly needs fleshing out so that researchers are working with common understandings. As a good starting point, one definition of *revitalization* includes the following elements (from Behrens, Hamann, & Hurd, 2004): bargaining power, political power, membership density, and an *institutional vitality* variable measuring union openness to substantive internal reform. The extent of revitalization, based on aggregate assessments of

such indicators, can be analyzed at local, sectoral, national, and global levels. Revitalization should not be confused with innovative union strategies, which may or may not contribute to labor movement revitalization<sup>i</sup>.

*Revitalization*, to be sure, is not only a concept in need of specific indicators and definition but also a vision of expanded democratic representation and social solidarity. Labor movements in Sweden and the United States in the 1930s, Italy in the 1970s and again in the 1990s, Poland and South Korea in the 1980s, and Brazil in the 1990s provide useful examples. Labor revitalization is a broad social phenomenon that greatly expands workforce mobilization and democratic voice. Moving beyond existing constraints, revitalized labor movements generate social pressure that can reform or transform political and economic institutions. Labor movement revitalization, in other words, offers the promise not just of incremental reform but of broader social justice as well.

### **Locus of Analysis: Local, National, and Global**

In a global economy, of special significance are the mutual influences and causal linkages among outcomes at local, national, and global levels. We know that the many economic, political, and social factors associated with globalization have transformed national policy options and debates. We also know that national policy continues to have important impacts on local conditions and politics. Effects run the other way around as well—from local to national and from national to global—although perhaps less so. Just as government and corporate strategies interact among the three levels, so too do union strategies.

Research on union strategies is therefore necessary at all three levels, including and especially for the linkages in strategy development between the local, national, and global. This expanded focus moves well beyond the past and present labor research that typically emphasizes national-level, sectoral-level, or plant-level industrial relations while largely omitting not only the transnational (beyond acknowledging the effects of multinational corporate strategies and their reinforcing global institutions) but the critical linkages among the various levels as well. Although such multilevel interactions are increasingly examined elsewhere across the social sciences, in sociology, political economy and geography (e.g., Herod, 2001; Sellers, 2002), there has as yet been little comparable research in the field of industrial relations. Going global—beyond comparative national studies—to examine multilevel strategies, interactions, and governance is a major task for revitalization research and a promising area for new knowledge and theory<sup>ii</sup>.

An emerging global governance regime in the shipping industry, for example, including collective bargaining of minimum labor standards, reshapes the possibilities for innovative national and local union strategies for seafarers and dockworkers (Lillie, 2004). Local mobilization by unions and other actors in Seattle in 1999 laid the groundwork for labor, environmental groups, and other nongovernmental organizations to participate together in subsequent anti-World Trade Organization, International Monetary Fund, and Group 7 campaigns of global significance (Klein, 2002). National political efforts led by unions and environmental groups across North and South America have helped to undermine prospects for a U.S.-led Free Trade Area of the Americas—yet another trade agreement lacking in meaningful labor and environmental standards. And the mobilization of immigrant workforces in cities such

as Los Angeles and San Jose has transformed local politics, building on growing labor migration in a global economy (Milkman & Wong, 2001).

Contemporary studies of union strategy need to examine—in case studies and survey research that test working hypotheses—causal relationships at work in strategy development across the various levels. Are national union strategies still decisive in shaping both local and international union strategies? Or, as some would argue, is the influence of national actors (from governments to employers and unions) increasingly squeezed between global multinational corporations, institutions, nongovernmental organizations, and resurgent local forces? Moving beyond conventional approaches, revitalization analysis suggests that contemporary union strategies can be understood only with reference to multiple levels of action and governance. The relative success or failure of such strategies may well depend on the complementarity of global, national, and local strategies. A new research agenda should thus examine the multilevel interactions for unions, their allies, and opponents. Along the way, such research can also cast light on broader debates concerning the political and economic effects of globalization.

### **Beyond Current Analytical Frameworks**

Although previous analysis may have been appropriate to earlier circumstances, received frameworks are significantly flawed in relation to changed contemporary conditions. Dominant analytical perspectives are rooted in a postwar context of the prosperous global North: unchallenged internal nation-state authority in a stable world order with more or less stable systems of industrial relations. Significantly outdated worldviews have shaped traditional postwar labor research (1940s to 1980s), the transformation literature (1980s to 1990s), social movement studies (1970s to 1990s), and the more recent varieties of capitalism literature (1990s to present).

The traditional systems approach (Dunlop, 1958) has been widely criticized, especially for an emphasis on institutional stability and actor adaptation. Transformation theorists (Kochan et al., 1986) and their critics (such as Goldfield, 1987) developed and elaborated the now widely accepted criticisms. Surprisingly, then, the recent varieties of capitalism perspective (Hall & Soskice, 2001) again emphasizes the stability of national systems. Although the varieties approach provides important insights for the comparative analysis of existing national institutions (especially their contrasting effects in shaping technological and other economic innovation), the fundamental bias is firm-centric, national, and to some extent (unintentionally) conservative. Unions are relegated to a largely reactive role—as social partners (well integrated in an important but generally subordinate role) in European coordinated market economies, but increasingly irrelevant although occasionally destabilizing forces in liberal market economies such as the United States and United Kingdom (Thelen, 2001). Union behavior is largely determined by economic institutions and employer choices. Useful in understanding national differences, this literature's relevance is limited by its tendency toward institutional determinism in a turbulent global economy.

The transformation approach, by contrast, emphasizes the role of strategic choice, especially employer opposition to unions, in destabilizing the established industrial relations order in the United States and elsewhere<sup>iii</sup>. Applied to contemporary union revitalization

efforts, strategic choice analysis provides theoretical and conceptual underpinnings for an expanded research agenda. Bringing actor strategies and the destabilization of institutions into the center of analysis are significant contributions. Yet the further development of transformation research is limited by an orientation toward modest employer-dominated reform, including labor-management cooperation, employee participation, concession bargaining, work reorganization, human resource management, and a rearguard defense of diminished channels of collective bargaining. Rather than an emphasis on renewed democratic vitality, analysis and policy recommendations are rooted in concerns about economic competitiveness. Together, such emphases and corresponding labor law reform proposals were packaged in the United States for what turned out to be an impossible employer-union consensus in the recommendations of the 1994 Dunlop Commission (Kochan, 1995).

The revitalization perspective, by contrast, brings unions and other social actors—in addition to employers and government—into the center of analysis, where they belong. We believe that unions have meaningful proactive choices beyond adaptation or subordination, in any institutional context and in the face of any set of power relationships or challenges. The decline of postwar industrial relations in the United States, for example, was predetermined neither by the institutional framework (including labor law) nor mounting employer opposition. The great failure of American unions—under the conservative leadership of George Meany and Lane Kirkland—was denial and, above all, the inability to craft appropriate, innovative strategies in the face of employer mobilization and changing economic and political circumstances. The organizing unions of the 1980s and 1990s, by contrast, turned to strategic innovation and grassroots mobilization, opening the door for the Sweeney forces in 1995 and the possibility—if it's not too late—of labor movement revitalization.

Independent, proactive union strategies matter a great deal in today's turbulent global economy. Impressive coalition building efforts in Seattle in 1999 helped transform international debates on trade and economic policy—something that neither transformation nor varieties perspectives had any way of predicting. The participation of some unions in the Iraq antiwar movement (a far cry from the hawkish AFL-CIO policies of the cold war) helped to swell massive worldwide demonstrations and broad opposition to unilateral military intervention. Acting locally and in many cases thinking globally, new labor-community coalitions have transformed politics in American cities such as Los Angeles, Las Vegas, Seattle, San Jose, and Milwaukee. Living wage campaigns, often union-led, have raised incomes for low-wage workers in more than 100 American cities (Luce, 2005 [this issue]). Anti-sweatshop campaigns have inspired a new generation of pro-labor campus activists. The AFL-CIO's dramatic shift on immigrant rights has opened the door for workplace and citizenship mobilization from Los Angeles and Houston to Miami and Boston (Milkman, 2000).

On the downside, most unions in the United States—and elsewhere—continue to pay only lip service to innovative activism such as organizing—a persistent strategic failure that demands explanation by revitalization analysts. Just as unions failed to reverse membership decline in the 1980s and 1990s, so too have unions, for example, so far failed to develop the coalitions and campaigns necessary to organize the world's largest private sector employer: Wal-Mart. It is not enough to blame labor law or government policy or the militant antiunion strategies of Wal-Mart management, if union strategies matter. Innovative, comprehensive campaigns show considerable promise, although few unions are truly pushing the envelope at

Wal-Mart or elsewhere. Can Wal-Mart be organized? This is a massive low-wage, patronized nationwide workforce with minimal rights and benefits and no workplace representation. There is no inherent reason to believe that such a workforce cannot be organized—with strategies such as grassroots mobilization led by a broad alliance of activist unions, drawing on the support of local coalitions (of community, environmental, immigrant rights, religious, and smart-growth activists) with a full arsenal of proven tactics. Collective actors throughout history have overcome great odds in battles for social justice.

Viable, innovative strategies can make a difference, no matter what the opposition.

With a focus on activism and mobilization (see also Kelly, 1998), another literature long neglected in industrial relations offers useful insights: the social movement literature, based mainly in sociology, political science, and social history (Turner, 2003). Although industrial relations has ignored the study of social movements, theorists of social movements have returned the favor by largely omitting labor, except when wildcat strike waves and militant unions exert social movement pressure<sup>iv</sup>. Revitalization studies offer an opportunity to correct both one-sided omissions. Most social movement research has focused on social movements as dependent variables, examining the conditions under which social movements arise. Common explanations privilege changes in the political opportunity structure, such as crises, institutional collapse, or divisions among the powers that be. Such findings can inform revitalization research, when union strategies are analyzed as dependent variables. On the other hand, social movement literature has all too often neglected the political and institutional effects of periods of mass mobilization<sup>v</sup>—a failing that revitalization research can help to correct, in conjunction with a recent broadening of social movement analysis into contentious politics. The latter concept has widened the focus to include broader political conflict and, at the same time, has expanded to include emerging transnational movements, including labor and their linkages to national and local movements (McAdam, Tarrow, & Tilly, 2001).

### **Theoretical, Conceptual, and Empirical Innovation**

Grounded in the reality of past victories and present possibilities, revitalization research aims to bring theoretical, conceptual, empirical, and normative innovation to the study of labor in contemporary society. The theoretical focus centers on the causal relationships between actor strategy and the rise and fall of workplace representation and democratic vitality. Incorporating the widely accepted role of institutions in shaping behavior by presenting actors with a range of choice, the emphasis shifts to collective actors who can build, destroy, reform, or transform institutions. Synthesizing insights from transformation, varieties, and social movement literature, revitalization theory places union strategy at the center of causal analysis, both as dependent variable (examining the conditions under which innovative strategies emerge—or fail to emerge) and independent variable (considering the effects of strategic innovation in renewing organizations and reforming institutions).

The conceptual focus of revitalization work breaks with understandings of unions as stable, business-like organizations, more or less integrated into industrial relations systems, that bargain, cooperate, and make concessions or incremental gains in well-worn institutional channels. Rather, unions are conceived of as contingent, membership-based organizations that can suppress or unleash democratic participation; innovate or stagnate; organize, mobilize, or

hold the line; and expand as a broad partisan force in coalitions for economic and political reform or circle the wagons as special interest groups. Which strategies prevail depends to a great extent on internal conflicts, politics, and leadership contests. Union strategies are thus also contingent, taking shape as choices among a range of options, traditional and innovative, focused narrowly on one or two strategies or broadly on a range of overlapping efforts. Finally, unions are conceived of as collective actors capable not only of negotiating with firms and pressuring governments but as actors capable of transforming industrial relations, public policy, and institutions— at local, national, and global levels across a wide array of potential arenas and contentious issues.

The empirical focus of revitalization research is on the emergence, choice, success, or failure of particular union strategies. A recently concluded international research project, for example, conducted comparative research on six key revitalization strategies: organizing, political action, coalition building, labor-management partnership, internal organizational reform, and international solidarity (Frege & Kelly, 2004)<sup>vi</sup>. Comprehensive campaigns include many if not all of these strategies combined in protracted efforts aimed at overcoming aggressive employer opposition. Relevant research targets include the content of particular strategies, the conditions under which they emerge, their relative success, and their economic and political effects. The growing body of revitalization research also examines the emergence, content, and effects of union strategies at various levels as well as the linkages among local, national, and global strategies and an assessment of their interactions and mutual influence. In such research, in-depth case studies are essential, especially to understand innovations and their causes and impacts. Aggregate data collection is also necessary to identify broad patterns of innovation (or its absence). Both qualitative and quantitative research are required to understand and analyze contemporary union strategy (Hall, 2003; Whitfield & Strauss, 1998).

The normative focus of this approach builds on the often supportive attitude toward unions and other democratic forces found in much social science literature, including especially the schools of thought considered here. Moving beyond such value orientations, however, we focus on unions and their strategies not only for their contribution to workplace representation and economic performance but because we view the revitalization of the labor movement as essential for democratic vitality, global justice, and for reversing the relentless inequality found throughout the global North and South. We see union decline not as an unfortunate but irreversible social process but rather as a social calamity that opens the floodgates to continuing social polarization, threatening the very existence of meaningful democracy.

We admire the activists young and old who put their passionate efforts into organizing, coalition building, and politics. In many countries, young activists today freely cross the lines between union, anti-sweatshop, antiwar, human rights, and environmental campaigns. In so doing, they renew the possibility of labor as a powerful force for social justice, capable not only of reversing its own decline but of promoting broader movements for equality of opportunity and workplace representation.

We focus on union strategies and labor movement revitalization, in other words, because these are of the essence. And our work has meaning only if our findings are of use for the practitioners of present and future labor and social justice campaigns.

Aspects of the theoretical, conceptual, empirical, and normative framework offered here can be found in all of the literatures we critique. What is new is the refocusing of theory

and research around the study of actor strategies and revitalization and the broadened framework for addressing major domestic and international economic conflicts of our era. The revitalization perspective is interdisciplinary; examines local, national, and global campaigns and the interactions among them; and sets the study of labor in the context of contemporary efforts to renew democratic participation throughout our changing world economy and society.

Much of social science research in the fields we cross—industrial relations, political science, sociology, economics, and geography—assumes that the big questions are answered, leaving subsequent research to work out the details. Examples include studies of the voting behavior of congressional subcommittees (political science), detailed examinations of minor innovation in collective bargaining contracts (industrial relations), and equation-driven sociological studies of deviant behavior among marginal subgroups. Many of the articles published in major academic journals present such narrow research, justified as important by methodological sophistication or as new (if very minor) findings that plug one small gap in the dominant paradigm<sup>vii</sup>. Some analyses are so narrowly subfield specific that new vocabularies must be developed, in some cases so obscure that academics outside the area of specialization cannot fathom the meaning of key concepts or even article titles.

By contrast, revitalization researchers seek to cast new light on big questions. Such questions, we believe, are not adequately addressed by existing literatures in a wide-open global economy. It is not at all clear how democratic vitality can be established on new terms in contemporary circumstances at the various levels—local, national, and global—where democratic processes must exist. We are interested in the ways in which innovative union strategies can push forward the battles that will shape societies of the future: in Guatemala and South Korea, in Canada and the United States, in public and private sectors, at the International Monetary Fund and in regional trade negotiations. As they arguably have not been for many years, the big questions are open enough that academics so inclined may well abandon mop-up operations of the past and instead join promising efforts to develop research designs that address today's grand challenges. Both transformation and social movement literatures have made such contributions in relation to past circumstances, in innovative theory building that now demands further development in a rapidly changing global economy.

### **The Findings: Mobilization Matters**

The articles in this special issue of *Work and Occupations* offer contributions to the growing body of literature on labor movement and democratic revitalization from a variety of perspectives across a range of geographical locations. Starting in North America, coauthors Christian Levesque, Gregor Murray, and Stephane Le Queux examine the problem of worker disaffection from unions, based on original data gathered from local union leaders and members in the Canadian province of Quebec. The evidence suggests a variety of illuminating cause-and-effect relationships that together point toward the centrality of union democracy in raising member commitment and, by extension, for the revitalization of the labor movement.

Stephanie Luce looks at the possible contributions of living-wage campaigns to a broader renewal of union influence in the United States. Although living-wage legislation is typically adopted with union support, the key battle is for implementation, and here the most important factors for success are sustained coalition efforts based on rank-and-file

mobilization. Beyond the immediate issue, living-wage campaigns are significant for their spillover effects, when common efforts lead to more coalition work and expanded influence in local politics, and when unions can build on such campaigns to promote organizing efforts, pro-labor legislation, and a broader revitalization of labor and allied progressive social forces.

The development of new organizing strategies—including comprehensive campaigns and a broader range of tactics that move beyond traditional National Labor Relations Board approaches—has been at the center of union revitalization efforts during the past decade in the United States, as in other countries of the global North such as Britain, Canada, and Australia. Kate Bronfenbrenner has long been prominent in assembling the data and analysis that has helped to guide innovative union organizing strategies. In her article for this special issue, she highlights the central role of working women in new organizing efforts, along with the higher rate of success in workplaces with a majority of women. And this is especially true when minority women are present in large numbers and when unions develop broad, comprehensive campaigns. So far, however, women are not represented in leadership positions at a level approaching what their growing membership and activism would indicate. Bronfenbrenner thus points to the compelling need for unions to open the door to leadership for women while expanding innovative and comprehensive strategies to organize women and men, White and minority.

Ralph Armbruster-Sandoval shifts the focus to Central America, with four rich case studies of anti-sweatshop organizing and bargaining campaigns. Targeted at companies in Guatemala, Nicaragua, Honduras, and El Salvador, these campaigns drew on outside international and domestic support along with worker mobilization in the most difficult of circumstances. Comparative case study analysis shows that successful outcomes require three key elements: a strong local union, a unified transnational advocacy network, and a vulnerable corporation as target of the campaign. Even in the cases where organizing and bargaining breakthroughs are made, however, victories are short-lived in the face of employer counter-mobilization or relocation. The lesson here is that gains for workers' rights in the global South are limited at best on a case-by-case basis and that progress is sustainable only in the context of a broader, international challenge to the dominant neoliberal capitalist regime.

Jennifer Chun's article squares the circle with an innovative comparison of organizing campaigns in South Korea and the United States. Although differing in concepts of morality and law, sustained efforts to organize subcontracted janitors at two public universities, one in each country, used surprisingly similar strategies resulting in successful outcomes. In both cases, workers and their supporters transformed labor disputes into broader battles for social justice. In so doing, they overcame labor-market weakness with visible mobilizations that won broad public support. That such models of strategic success can travel across national boundaries, even in countries at differing levels of economic development, points toward the global relevance of broadly conceived, mobilization-based campaigns.

### **Labor Revitalization in a Global Economy**

The articles in this special issue reach parallel conclusions about the requirements for labor movement revitalization in a global economy. Traditional, narrowly focused union strategies no longer work, beyond selected workplaces where for the most part unions are

already entrenched. Ongoing global liberalization has weighted the odds heavily against organizing, bargaining, and legislative success, unless such efforts are part of rank-and-file-based mobilizations that attract broad social support in campaigns framed as battles for social justice. Such comprehensive efforts appear necessary both for labor revitalization and for the broader expansion of democratic rights to which innovative labor strategies contribute.

The stakes are high, and time is short. Expansive theoretical, conceptual, empirical, and normative innovations are needed to guide contemporary labor research. The historic task for unions is to reform or transform global capitalism, analogous perhaps to the ways in which labor and social democratic movements reformed national capitalism in the global North, bringing a measure of social stability to dangerously unstable and polarized societies. Revitalized unions along with the mounting pressure of other social forces are the essential democratic counterweights to political and economic domination by the already powerful.

The potential and essential revitalization of the labor movement demands of us a revitalized research agenda, to chart successes and failures for strategic innovation, to assess what is and is not possible, and to offer credible insights for leaders and activists on the front lines in contemporary battles for social justice.

## References

- Armbruster-Sandoval, R. (2005). Workers of the world unite? The contemporary anti-sweatshop movement and the struggle for social justice in the Americas. *Work and Occupations*, 32, 464-485.
- Behrens, M., Hamann, K., & Hurd, R. (2004). Labor movement decline and revitalization. In C. Frege & J. Kelly (Eds.), *Varieties of unionism: strategies for labor movement renewal in the global north* (pp. 11-30). Oxford, UK: Oxford University Press.
- Behrens, M., Hurd, R., & Waddington, J. (2004). Organizational reform and restructuring within trade unions. In C. Frege & J. Kelly (Eds.), *Varieties of unionism: strategies for labor movement renewal in the global north* (pp. 117-136). Oxford, UK: Oxford University Press.
- Bronfenbrenner, K. (2005). Organizing women: The nature and process of union-organizing efforts among U.S. women workers since the mid-1990s. *Work and Occupations*, 32, 441-463.
- Bronfenbrenner, K., Friedman, S., Hurd, R., Oswald, R., & Seeber, R. (Eds.). (1998). *Organizing to win: New research on union strategies*. Ithaca, NY: ILR Press, Cornell University Press.
- Chun, J. J. (2005). Public dramas and the politics of justice: Comparison of janitors' union struggles in South Korea and the United States. *Work and Occupations*, 32, 486-503.
- Cornfield, D., & McCammon, H. (Eds.). (2003). *Research in the Sociology of Work: Vol. 11. Labor revitalization: Global perspectives and new initiatives*. Amsterdam, the Netherlands: JAI.

Delia Porta, D., & Tarrow, S. (Eds.). (2004). *Transnational protest and global activism*. Lanham, MD: Rowman & Littlefield.

Dunlop, J. T. (1958). *Industrial relations systems*. New York: Holt.

Fletcher, B., & Hurd, R. (2001). Overcoming obstacles to transformation: Challenges on the way to a new unionism. In L. Turner, H. Katz, & R. Hurd (Eds.), *Rekindling the movement: Labor's quest for relevance in the 21st century* (pp. 182-208). Ithaca, NY: Cornell University Press.

Frege, C, & Kelly, J. (Eds.). (2004). *Varieties of unionism: strategies for labor movement renewal in the global north*. Oxford, UK: Oxford University Press.

Goldfield, M. (1987). *The decline of organized labor in the United States*. Chicago: University of Chicago Press.

Gordon, M., & Turner, L. (Eds.). (2000). *Transnational cooperation among trade unions: Philosophy, structure and practice*. Ithaca, NY: Cornell University Press.

Hall, P., & Soskice, D. (2001). *Varieties of capitalism: The Institutional foundations of comparative advantage*. New York: Oxford University Press.

Hall, P. A. (2003). Aligning ontology and methodology in comparative research. In J. Mahoney & D. Rueschemeyer (Eds.), *Comparative historical analysis in the social sciences* (pp. 373- 404). Cambridge, UK: Cambridge University Press.

Heckscher, C. (2003). Book Review. *British Journal of Industrial Relations*, 41, 135-138.

Herod, A. (2001). *Labor geographies: Workers and the landscapes of capitalism*. New York: Guilford.

Hurd, R. (1998). Contesting the dinosaur image: The Labor Movement's search for a future. *Labor Studies Journal*, 22, 5-30.

Inglehart, R. (1977). *The silent revolution: Changing values and political styles among western publics*. Princeton, NJ: Princeton University Press.

Janos, A. (1986). *Politics and paradigms: Changing theories of change in social science*. Stanford, CA: Stanford University Press.

Keck, M., & Sikkink, K. (1998). *Activist beyond borders: Transnational advocacy networks in international politics*. Ithaca, NY: Cornell University Press.

Kelber, H. (1999). *The "palace revolution" that changed the AFL-CIO*. New York: Labor Educator.

Kelly, J. (1998). *Rethinking industrial relations: Mobilization, collectivism and long waves*. London: Routledge.

Klein, N. (2002). *Fences and windows: Dispatches from the front lines of the globalization debate*. New York: Picador.

Kochan, T. (1995). Using the Dunlop Report. *Industrial Relations*, 34, 350-366.

Kochan, T, Katz, H., & McKersie, R. (1986). *The transformation of American industrial relations*. New York: Basic Books.

Kuhn, T. (1962). *The structure of scientific revolutions*. Chicago: University of Chicago Press.

Levesque, C, Murray, G., & Le Queux, S. (2005). Union disaffection and social identity: Democracy as a source of union revitalization. *Work and Occupations*, 32, 400-422.

Lillie, N. (2004). Global collective bargaining on flag of convenience shipping. *British Journal of Industrial Relations*, 42, 47-67.

Luce, S. (in press). Future of the Labor Movement: Lessons from the living wage campaigns. *Work and Occupations*. McAdam, D., Tarrow, S., & Tilly, C. (2001). *Dynamics of contention*. New York: Cambridge University Press.

Michels, R. (1962). *Political parties: A sociological study of the oligarchical tendencies of modern democracy*. New York: Dover.

Milkman, R. (Ed.). (2000). *Organizing immigrants: The challenge for unions in contemporary California*. Ithaca, NY: Cornell University Press.

Milkman, R., & Wong, K. (2001). Organizing immigrant workers: Case studies from southern California. In L. Turner, H. Katz, & R. Hurd (Eds.), *Rekindling the movement: Labor's quest for relevance in the 21st century* (pp. 99-128). Ithaca, NY: Cornell University Press.

Moody, K. (1997). *Workers in a lean world: Unions in the international economy*. New York: Verso.

Nissen, B. (Ed.). (2002). *Unions in a globalized environment*. Armonk, NJ: M.E. Sharpe.

Piven, F, & Cloward, R. (1977). *Poor people 's movements: Why they succeed, how they fail*. New York: Pantheon Books.

Schumpeter, J. (1954). *Capitalism, socialism and democracy* (4th ed). London: Allen & Unwin.

Sellers, J. (2002). *Governing from below: Urban regions and the global economy*. Cambridge, UK: Cambridge University Press.

Thelen, K. (2001). Varieties of labor politics in the developed democracies. In P. Hall & D. Soskice (Eds.), *Varieties of capitalism: The Institutional foundations of comparative advantage* (pp. 71-103). New York: Oxford University Press.

Turner, L. (2003). Reviving the Labor Movement: A comparative perspective. In D. Cornfield & H. McCammon (Eds.), *Labor revitalization: Global perspectives and new initiatives* (pp. 23- 57). Amsterdam, the Netherlands: JAI.

Turner, L., Katz, H., & Hurd, R. (Eds.). (2001). *Rekindling the movement: Labor's quest for relevance in the 21st century*. Ithaca, NY: Cornell University Press.

Waterman, P. (1998). *Globalization, social movements and the new internationalisms*. Washington, DC: Mansell.

Whitfield, K., & Strauss, G. (Eds.). (1998). *Researching the world of work: Strategies and methods in studying industrial relations*. Ithaca, NY: Cornell University Press.

---

<sup>i</sup> To clarify the distinction for causal analysis (and to avoid tautology), union strategies are on one side of the equation and labor movement revitalization is on the other.

<sup>ii</sup> See, for example, Moody (1997), Waterman (1998), Gordon and Turner (2000), and Nissen (2002) for early efforts in this direction.

<sup>iii</sup> Although transformation theorists refer diplomatically to employer opposition (Kochan, Katz, & McKersie, 1986), others have emphasized the full-blown assault on union influence with terms such as *employer offensive* (Goldfield, 1987) and *employer counter-mobilization* (Kelly, 1998).

<sup>iv</sup> In much of postwar social movement literature, labor is marginalized as an old social movement, hardly worthy of contemporary study (Inglehart, 1977; Keck & Sikkink, 1998).

<sup>v</sup> See Piven and Cloward (1977) for a prominent exception.

<sup>vi</sup> See also the March 2003 special issue of the *European Journal of Industrial Relations*.

<sup>vii</sup> See Kuhn (1962) and Janos (1986). More recently, Charles Heckscher (2003) refers to the current "age of too many cautious studies testing narrow hypotheses with single data sources" (pp. 138).