BroadVoice

Broadening the spectrum
of employee voice
in workplace
innovation

Analytical Framework on Direct Worker Participation

Deliverable 2.2

Project Consortium

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D2.2 Analytical Framework on Direct Worker Participation

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Abbreviation

E.g	Exempli gratia, for example
EU	European Union
HRM	Human Resource Management
I.e.	In essence
US	United States

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Executive Summary

This analytical framework aims to guide BroadVoice partners in analyzing data from empirical research on national company case studies where workplace innovation via direct worker participation interacts with the presence of worker representatives. The framework synthesises insights from both international and national literature to provide a comprehensive tool for understanding the unfolding of such dynamics.

More specifically, the framework identifies several key factors influencing workplace industrial relations and labour representation in direct worker participation, emphasising the ideas and capacities of worker representatives as critical elements, as well as their power resources. Management attitudes are considered as important too.

Secondly, four models of interaction between workplace industrial relations and direct worker participation are outlined: i) the bipartite (adversarial) model, where worker participation is largely representative, while direct channels tend to be less developed and/or shaped solely by management; ii) the HRM model, where direct participation is the dominating form of worker voice, promoted and shaped by management for economic purposes, while labour representation is quite weak; iii) the hybrid (cooperative) model, where both representative and direct forms of worker participation coexist and are almost equally developed; and iv) the democratic (participatory) model, where not only both direct and representative channels of worker participation are developed, but they are also interconnected and constitute the organisational architecture of broader corporate innovation plans. These models cannot be considered as static, yet they need to be viewed as repertoires of possible combinations between direct participation and industrial relations in a given work setting over time.

In addition, key features of direct worker participation are explored, including: i) objectives (which are mainly economic, social, democratic and humanistic, although managerial objectives of control over workers and information flows have also been reported); ii) intensity (ranging from information and consultation (and joint examination), up to codetermination (or joint decision) and worker control); iii) forms (involving individuals or groups, entailing verbal or written procedures, etc.); iv) modes of regulation (either unilateral, joint labour-management or legal); v) scope (focusing on cultural, executive, managerial or strategic issues), and vi) the breadth and depth of participation (hinting at the degree of combination between different participation practices and their embeddedness in the organisational context).

The framework also assesses the impacts of direct worker participation on workers, organisations and transformations, highlighting social, organisational, and innovation outcomes. These effects are also found to be mediated by some external factors (concerning e.g., company context, workers' characteristics, institutional framework) and dependent on conditions strictly inherent to the modes

of implementation of direct worker participation (regarding e.g., its breadth and depth as well as its integration with representative participation).

The document is structured to provide a thorough understanding of direct worker participation and its possible interplay with indirect representative participation, enhancing a structured discernment of how these elements contribute to workplace dynamics and outcomes.
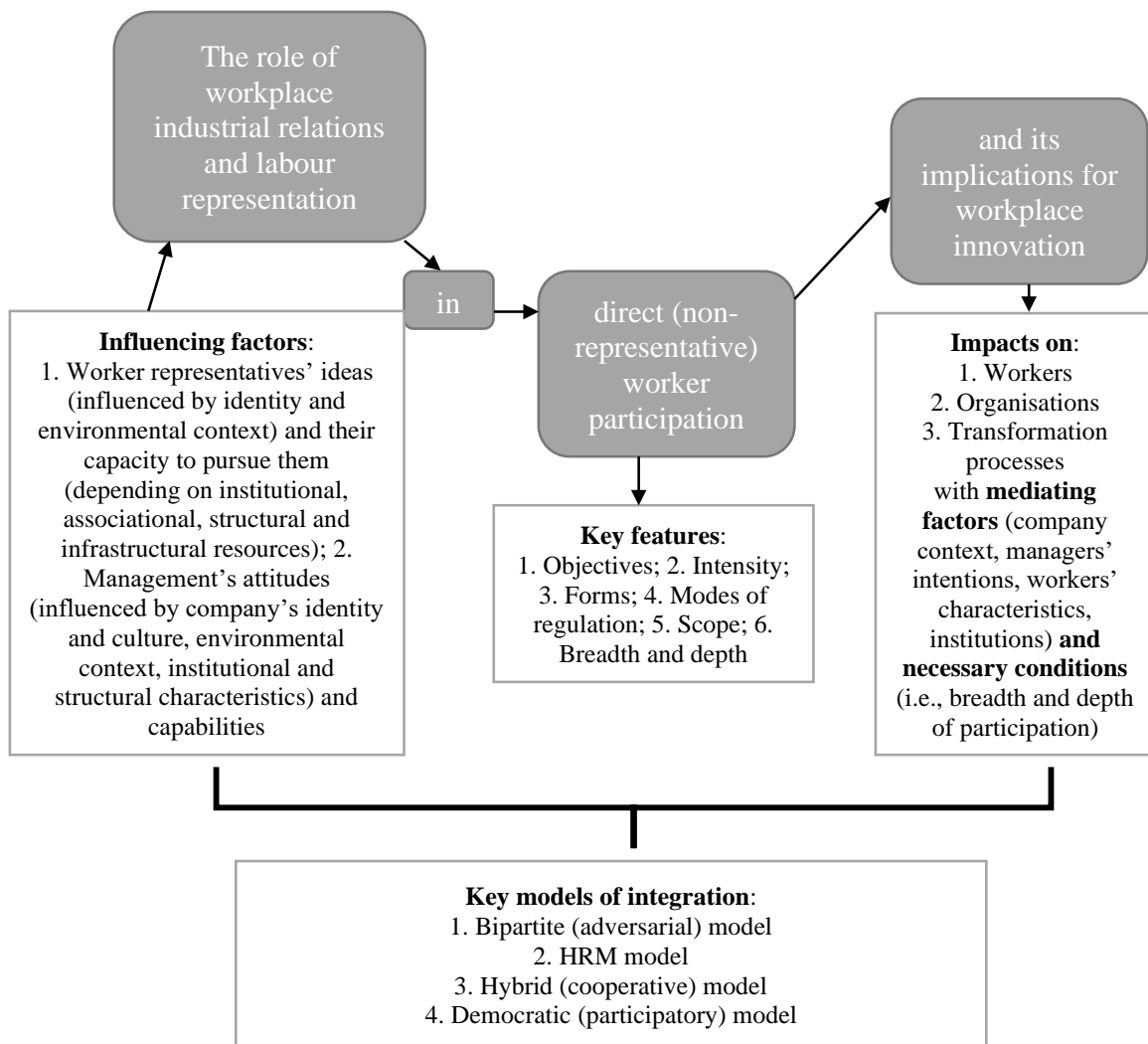
1. Introduction

Developed within the context of BroadVoice project, **this analytical framework aims at guiding BroadVoice partners in the analysis of information and data collected from empirical research on national company case studies where workplace innovation via direct worker participation interacts with the presence of worker representatives**. The framework serves to provide analytical lenses to assess and explain the various researched experiences. It draws on a literature review already drafted within the framework of BroadVoice (corresponding to Deliverable 2.1) and further research from both international (written in English language) and national (written in the languages spoken by the BroadVoice consortium) sources, which have been found through online desk research via Google as main browser. A limit of this framework concerns the fact that bibliographic sources mainly concentrate on North America and Western and Northern European countries, while, despite a few exceptions (e.g., Franca & Pahor, 2014; Prouska et al., 2022), research on direct worker participation focusing on Central Eastern European countries (an area relevant for an EU-cofunded project) is quite limited.

This framework is structured into four main sections. Paragraph 1 sheds light on the main factors influencing the role of workplace industrial relations and labour representation on direct worker participation; Paragraph 2 outlines four key models of interaction between workplace industrial relations and direct worker participation; Paragraph 3 illustrates the key features and dimensions associated to direct worker participation; and Paragraph 4 describes the main impacts of direct worker participation on workers, organisations and transformations, by also looking at the mediating role of industrial relations.

The following image summarises the contents of this analytical framework.

Figure 1. The representation of our analytical framework

The role of workplace industrial relations and labour representation

in → direct (non-representative) worker participation

and its implications for workplace innovation

Influencing factors:
1. Worker representatives' ideas (influenced by identity and environmental context) and their capacity to pursue them (depending on institutional, associational, structural and infrastructural resources); 2. Management's attitudes (influenced by company's identity and culture, environmental context, institutional and structural characteristics) and capabilities

Key features:
1. Objectives; 2. Intensity; 3. Forms; 4. Modes of regulation; 5. Scope; 6. Breadth and depth

Impacts on:
1. Workers
2. Organisations
3. Transformation processes
with **mediating factors** (company context, managers' intentions, workers' characteristics, institutions) **and necessary conditions** (i.e., breadth and depth of participation)

Key models of integration:
1. Bipartite (adversarial) model
2. HRM model
3. Hybrid (cooperative) model
4. Democratic (participatory) model

2. The role of workplace industrial relations and labour representation: key influencing factors

First of all, the coexistence of representative and direct worker participation has sometimes been questioned in literature. Indeed, on the one hand, direct worker participation has affirmed, especially in US workplaces, as a union avoidance strategy developed by management (Danford et al., 2008; Kochan et al., 1986). On the other hand, it has been argued that strong rights of representation may make information- and consultation-based direct participation practices redundant (Godard, 2004). However, empirical research shows that direct worker participation has been implemented also in workplaces endowed with labour representation bodies (e.g., Ahlstrand & Gautié, 2023; Armaroli, 2022; Cirillo et al., 2013; Haipeter, 2013; Rutherford & Frangi, 2020; Tros, 2022; Wood & Fenton-O'Creevy, 2005), often by performing roles and functions that are different from those carried out by representative participation (Loose et al., 2011). BroadVoice project specifically focuses on these contexts, with the aim to investigate the interplay between labour representation and industrial relations on the one hand, and direct participation on the other hand.

In this regard, the role of workplace industrial relations in direct worker participation has been found to be importantly mediated by **worker representatives**' ideas, possibly influenced by the interaction between their **identity** and the **environmental context** (referring to both sectoral/national and firm-specific trends, characterised e.g., by certain financial challenges, changes in the market scenario, organisational developments in workplaces, etc.), as well as their capacity to pursue those ideas (Armaroli, 2022; Rutherford & Frangi, 2020). **Ideological opinions** would therefore contribute to explain the development of certain worker representatives' orientations and discourses towards direct worker participation (Ahlstrand & Gautié, 2023; Armaroli, 2022; Johansson et al., 2013; Signoretti, 2019), which can be effectively implemented depending on worker representatives' capacity which is enabled by various power resources. Firstly, **institutional settings** and state-level characteristics of the industrial relations system (e.g., employment protection, freedom of association, the right to strike, collective bargaining arrangements, rules on workplace participation, etc.) are depicted as providing worker representatives with institutional power affecting their attitudes and concrete actions towards direct worker participation (e.g., Ahlstrand & Gautié, 2023; Armaroli, 2022; Cirillo et al., 2023; Looise et al., 2011; Roche & Geary, 2002; Signoretti, 2019; Tros, 2022). Moreover, public policy frameworks and specific programmes on workplace democracy and organisational innovation, at both national and local level, like those carried out in the Nordic countries and in Germany since the 1960s/1970s, may impact on the role of social dialogue on direct worker participation (Alasoini et al., 2017). Secondly, the capacity of worker representatives to mobilise workers around a certain idea and to impinge on managerial choices in the field of direct worker participation is found to rely on their **associational and organisational power** (proved e.g., by density rates, the degree of solidarity among workers, as well as the frequency and type of communications between the various channels and levels of labour representation, etc.), their **structural attributes** (determined e.g., by workers' distinctive skills, the position of the company in the supply chain, the tightness or slackness of the labour market, etc.), as well as on their

infrastructural resources (like representatives' knowledge and skills) (Ahlstrand & Gautié, 2023; Looise et al., 2011; Rutherford & Frangi, 2020; Signoretti, 2019). As contended by Lévesque and Murray (2010), power resources might not be enough for worker representatives to deal with certain challenges: they also need the capabilities to make use of power resources. With regard to the role of worker representatives in direct worker participation, such capabilities include **framing** (referring to the conceptualisation and formulation of narratives and discourses), **learning** (relating to the capability to reflect on and learn from past experiences) and **networking** (which means establishing relationships and partnerships with other actors, including external experts and professionals) (Armaroli, 2022; Rutherford & Frangi, 2022; Signoretti, 2019).

The ideological orientations of worker representatives are not the only to affect the interplay between industrial relations and direct worker participation in workplaces. **Management's attitudes** are found to be important too (Ahlstrand & Gautié, 2023), since, for instance, direct worker participation practices were introduced by managers for union avoidance purposes especially in the United States (Godard, 2004; Kochan et al., 1986) but also in the United Kingdom (Beale & Mustchin, 2014), or to decouple the firm from the costs associated with industrial relations institutions as in some German settings (Helfen & Schuessler, 2009). Managerial orientations and actions in this domain are possibly influenced by company's identity and culture, the environmental context (encompassing e.g., economic and financial challenges and constraints, market competition, etc.), the institutional framework, the structural characteristics of the company (depending on the nature of its ownership and governance structure, the position in the value chain, and so on), as well as managerial capabilities like framing, learning and networking (e.g., with consultants, employers' associations, other companies, etc.) (Ahlstrand & Gautié, 2023; Rutherford & Frangi, 2020).

3. The role of workplace industrial relations and labour representation: key models of integration

Our framework considerably relies on the four ideal types of worker participation, elaborated by Knudsen et al. (2011), though enriched with further conceptual models of interaction between worker representatives and organisational innovations and the evidences found in empirical research. Notably, Knudsen et al.'s ideal types, considerably drawing on Guest & Peccei (2001), illustrate different ways through which direct participation may be embedded in organisational contexts and linked to wider industrial relations structures. It is important to consider that, as shown in Paragraph 1, the approach of labour representatives and the characteristics of industrial relations, shaping specific models of worker participation, are influenced by various institutional, associational and structural factors of both workers and companies (Beale & Mustchin, 2014; Doellgast, 2008; Jirjahn & Smith, 2006; Wilthagen & Tros, 2014).

The first is the **bipartite (adversarial) model** comprising workplaces where worker participation is largely representative, while direct channels tend to be less developed and/or shaped solely by management. Worker representatives are on a defensive/confrontational stance, interacting with management generally for distributive issues and not concretely involved in the planning or implementation of any developmental matters (e.g., the introduction of organisational innovations via direct worker participation). Trust is quite low between management and worker representatives, and this explains both the former's autocratic approach and reluctance to deliver transparent and pre-emptive information, and the latter's unwillingness to share the responsibility for crucial organisational decisions with management (see also, Ahlstrand & Gautié, 2023). In these circumstances, worker representatives may either adopt a passive/apathetic attitude, given their uninterest in getting involved in the area, or show an obstructionist response (Frost, 2001), by opposing to the changes for the fear that direct worker participation may jeopardise labour representation density and power (Beale, 2003; Kochan et al., 1984). They can also hold a reactive/defensive (also defined as reluctant critical) attitude, by focusing solely on the limitation of possible negative aspects (see, e.g., Ahlstrand & Gautié, 2023; Cirillo et al., 2023; Gall, 2010).

The **HRM model**, instead, concerns those workplaces where direct participation is the dominating form of worker voice, promoted and shaped by management for economic purposes, while labour representation is quite weak, involved in discussions with management mostly for mandatory or 'economically advantageous' issues and showing a passive or apathetic attitude (Frost, 2001) towards direct worker participation and innovation projects, due to either a lack of interest or the perception of being too powerless to intervene. Management style is paternalistic overlooking the possible role of worker representatives in work organisation (Gill, 2009). In some cases, management's adoption of direct worker participation may be a concrete attempt to marginalise worker representation and may encounter trade union opposition (Kochan et al., 1986).

The **hybrid (cooperative) model** refers to workplaces where both representative and direct forms of worker participation coexist and are almost equally developed. Though informed and consulted before the introduction of organisational and technological innovations also implying direct worker participation, labour representatives tend not to concretely influence the design phase of such changes (see also, Pollert, 2000; Signoretti, 2017), even when they are formal signatory parties of labour-management agreements (see, e.g., Cirillo et al., 2023). However, labour representatives retain a more substantial role in the implementation and development of such changes, e.g., in relation to the management of instrumental measures, such as adjustments in working time, skills development, remuneration schemes, etc. (see also, Cirillo et al., 2023; Looise et al., 2011; Rocha, 2010). Moreover, worker representatives have a cooperative (or pragmatic, according to Frost, 2001) approach towards managers and are considered by them as valuable partners in innovation (see also, Gill, 2009; Rutherford & Frangi, 2020; Totterdill & Exton, 2014). In these contexts, though, worker representatives may aspire to an earlier involvement in the planning of developmental projects (Ahlstrand & Gautié, 2023). In other cases, they may end up fostering corporatist tendencies, by simply accepting that managers make workplace-related decisions directed at the alignment of workers' and managers' objectives (Cirillo et al., 2023; Danford et al., 2013). And this could be particularly likely in work contexts characterised by non-union labour representation bodies, like the Netherlands (Tros, 2022).

Finally, the **democratic (participatory) model** encompasses all those workplaces where not only both direct and representative channels of worker participation are developed, but they are also interconnected and constitute the organisational architecture of broader corporate innovation plans. Notably, workers (both directly and indirectly) play a truly proactive and constructive role in the planning, organisation and development of work, and worker representatives contribute to shaping also direct worker participation (see also, Armaroli, 2022). Worker representatives' approach may be depicted as proactive (Cirillo et al., 2023) or interventionist (Frost, 2001), implying an early-stage involvement in the design and implementation of changes. This approach may take the form of an initial challenge to managerial cost-saving plans and the concomitant elaboration of alternative solutions based on new organisational models (Haipeter, 2013). In some cases, it may be sustained by a trade union or works council own conceptualisation of direct worker participation and/or worker-driven innovation (Armaroli, 2022; Haipeter, 2013; Johansson et al., 2013; LO, 2008; Tros, 2022).

The above models of integration between representative and direct worker participation can be summarised in the following table.

Table 1. Key models of integration between representative and direct worker participation

Type of labour-management relations	Worker representatives' approach to direct participation	Shaping of direct worker participation	Models of integration

Autocratic management, adversarial relations	Either obstructionist, reactive/defensive or passive/apathetic	Usually not significantly developed, unilaterally shaped by management	Bipartite (adversarial) model
Paternalistic, unitarist management with scant or no role of worker representatives	Either passive/apathetic or obstructionist	Usually well developed, unilaterally shaped by management	HRM model
Cooperative partnership (especially in the implementation of workplace-related decisions)	Cooperative/pragmatic	Unilaterally designed by management while implemented and developed with worker representatives	Hybrid (cooperative) model
Democratic, participatory approach (from the top to the bottom of workplace decision-making processes)	Proactive/interventionist	Shaped jointly by management and worker representatives	Democratic (participatory) model

Though not representing all the possibilities for interaction between representative and direct worker participation, the above typology may provide a concrete initial support in the analysis of national experiences. It is also worth underlining that **these models, as shaped by labour representation's approach and the quality of labour-management relations, cannot be considered as static, yet they need to be viewed as repertoires of possible combinations between direct participation and industrial relations in a given work setting over time** (Beale & Mustchin, 2014; Rutherford & Frangi, 2022).

4. Direct (non-representative) worker participation: key features

By adopting its widely accepted meaning, as emerging from literature, we can consider direct worker participation as encompassing **practices and procedures which allow workers to exert some influence in decision making about work and the conditions under which they work** (see, among others, Gallie at al., 2017; Heller et al., 1998)**, without the mediation of representatives** (Della Torre et al., 2021).

As for direct worker participation's key features, our framework considers: i) **objectives**, ii) **intensity,** iii) **forms**, iv) **modes of regulation**, v) **scope** and vi) **breadth** and **depth**, which are among the most addressed traits of worker participation in literature.

With reference to the **objectives**, direct worker participation emerges as promoted to pursue four main target categories: economic, social, democratic and/or humanistic goals (see also Knudsen, 1995). The former is primarily concerned with improvements in work organisation, productivity, efficiency and quality (Dundon et al., 2004; Geary & Sisson, 1994; Strauss, 2006). Interestingly, within the framework of organisational (mainly economic) goals, we can distinguish, following Campagna & Pero (2017), between direct participation targeted at work management and direct participation aimed at specific innovation projects. Social goals of direct worker participation, instead, mainly refer to worker wellbeing, promoted by improving job satisfaction and working conditions (in terms of i.e., health and safety, job enlargement and enrichment, etc.) (Abildgaard et al., 2020; Geary & Sisson, 1994). In addition to the instrumental uses of participation, targeted at either economic or social objectives, direct participation may be activated for more ideational purposes. Notably, democratic objectives are pursued when direct participation is not (merely) seen as a means to achieve other objectives, but (also) as «an end in itself» for the promotion of workers' greater influence in decision-making processes at workplaces and the reduction of power imbalances (Abildgaard et al., 2020; Strauss, 2006). Similarly, there may be a humanistic argument for worker participation, when intended as an expression of worker self-determination, autonomy and human dignity (e.g., Armaroli, 2022; Strauss, 1998). Apart from these rather positive objectives, research shows that direct participation may also be implemented for monitoring and 'dominance' purposes, such as to increase management control over information and to marginalise union voice (e.g., Beale & Mustchin, 2014; Kochan et al., 1986).

As regards the **intensity** of direct worker participation, according to our framework, it may range from information and consultation (sometimes implying also joint examination) to codetermination (or joint decision) and worker control (Blyton & Turnball, 2004). Although research on direct participation has explicitly considered both consultation and worker control, especially in the form of worker task discretion delegated by management (Gallie, 2013; Geary & Sisson, 1994; Inanc et

al., 2015), codetermination has been mainly mentioned with reference to institutionalised representative participation (Leonardi, 2016), while information is often regarded as a partial form of participation (Pateman, 1970), at best implicit in consultation. However, to better grasp the various degrees of worker participation, all these possibilities are integrated in our framework and conceptualised separately. Notably, information is a preparatory yet fundamental step for worker participation, by consisting of the disclosure by management of pre-emptive information to workers. The direction of communication here is downward, from management to workers (Eurofound, 2015; Marchington & Wilkinson, 2005). Only informed workers can be consulted and involved in joint examination procedures, thus making their views known by management, which however retains the right to accept or reject them and take action (Gallie, 2013; Geary & Sisson, 1994). The direction of communication is upward here, from workers to managers, or bilateral in case of joint assessment procedures (Eurofound, 2015; Marchington & Wilkinson, 2005). Codetermination is a step further, implying a real cooperation between management and workers in decision-making processes. Labour-management bilateral interaction could thus occur within either consultative or co-determinative practices (Eurofound, 2015). Finally, worker control may occur when responsibility shifts from managers to workers (as either individuals or groups), who benefit, either thanks to delegation from management or a radical action carried out by workers themselves, from complete autonomy to make decisions (Blyton & Turnball, 2004; Gallie, 2013; Geary & Sisson, 1994). With reference to this kind of practices (e.g., task discretion, teamworking, self-management), Appelbaum and Batt (1995) refer to "on-line" participation where workers contribute to decisions as part of their daily job responsibilities, which is distinct from "off-line" participation occurring outside the work process often through representatives.

Direct worker participation may take different **forms**. Among others, it may concern individuals (e.g., in face-to-face interactions between supervisors and their staff) or groups of workers (e.g., within work teams); it may consist of verbal discussions (e.g., within meetings) or written information, suggestions and decisions (e.g., via suggestion boxes); it may involve all interested workers (direct participation in its purest form) or only a part of them upon appointment or election (Della Torre et al., 2021; Knudsen et al., 2011; Marchington & Wilkinson, 2005; Pero & Campagna, 2017). Direct worker participation may even occur in structures or bodies, where also worker representatives are involved ('hybrid worker participation', see e.g., Tros, 2022).

Also, the **modes of regulation** of direct participation may vary, ranging from unilateral regulation by management to joint labour-management regulation up to legal regulation (Geary & Sisson, 1994). Whereas legal regulation always implies a certain degree of formalisation, unilateral managerial regulation and joint regulation can be either formal (when participation procedures are codified in a document or agreement and therefore made formally binding) or informal (when direct participation is managed in informal manner and presumably less likely to be enforced). Importantly, joint labour-management regulation may be either individual (involving managers and individual workers) or collective (involving managers and worker representatives), and it may happen either at workplace or (through labour and managers' representatives) at industry level (Gollan et al., 2014).

Furthermore, direct worker participation may be classified according to its **scope**. An important distinction can be made between participation practices regarding cultural, executive, managerial or strategic classes of decisions (Leonardi, 2016). According to Baglioni (2001), cultural aspects concern corporate values, ideology and mission underlying managerial behaviour; executive (or operational) issues relate to the daily management of work organisation, the execution of single tasks and problems and improvements of specific departments or units (also Knudsen et al., 2011); managerial (or tactical) decisions refer to human resource management and the implementation of strategic choices at the organisational level, involving issues such as working time, health and safety, worker training, etc. (also Knudsen et al., 2011); finally, decisions may regard corporate strategies about e.g., new investments, relocations, partnerships, etc. (also Knudsen et al., 2011), although this kind of choices are more frequently associated with representative (rather than direct) participation (Pateman, 1970).

The above features can be summarised in the following table.

Table 2. Key models of integration between representative and direct worker participation

Objectives	Economic	Social	Democratic	Humanistic	Dominance
Intensity	Information	Consultation (and joint examination)	Codetermination (or joint decision)	Worker control	
Forms	Individuals vs. groups of workers	Verbal vs. written	All interested workers vs. a part of them		
Modes of regulation	Unilateral regulation	Joint labour-management regulation	Legal regulation		
Scope	Cultural	Executive (or operational)	Managerial (or tactical)	Strategic	

Two final analytical dimensions particularly useful when analysing entire work settings rather than specific participation practices, are: the **breadth** of direct worker participation, which is the linkage and combination of different participation channels in the workplace, and it is measured not simply by the number of worker participation practices, but also by the degree of their interconnection or combination; and the **depth** of worker participation, which is the degree of its embeddedness in a given workplace, and it is assessed, among other things, by the number of meetings, the opportunity for workers to raise issues and the relevance of the subjects addressed in participatory procedures (Cox et al., 2006).

As partly mentioned before, literature has shown that direct participation is more often associated with economic objectives pursued by management and decisions concerning operational or task-

related issues, on which information, consultation and control (through delegation) are more likely to occur than actual codetermination. However, our framework includes all the above-described varieties in order not to exclude any possibility of direct worker influence at the workplace. Furthermore, **it might be important to assess all these dimensions (and notably, the intensity and scope) not only in relation to direct worker participation but also to workplace labour representation, in order to evaluate their reciprocal roles and spaces** (Wood & Fenton-O'Creevy, 2005). Where and to what extent does direct worker participation occur? Where and to what extent does workplace labour representation operate? Do representative and direct worker participation relate to each other? **How do the above ideal types of direct worker participation's embeddedness in industrial relations settings concretely develop in workplaces, by also addressing the above dimensions?**

5. Implications for workers, organisations and transformations

Direct worker participation has proved to impact on workers, organisations and transformation processes.

From a **social perspective**, direct participation may positively influence both **workers' attitudes**, including their commitment, motivation, wellbeing and satisfaction at work (Holland et al., 2011; Looise et al., 2011), and **behaviour**, including their rates of absenteeism and turnover, their collaboration and flexibility (Looise et al., 2011). This may be possible thanks to **direct participation's effect on intrinsic** (such as work relations and climate, task content, variety and responsibility, as well as the degree of initiative and influence), and **extrinsic aspects of work** (such as greater opportunities for learning, greater scope for the use of skills, greater job security, greater procedural fairness, etc.) (Gallie et al., 2017; Gonzalez, 2010). It is however worth mentioning that negative impacts on the quality of work environment (in the form of i.e., increased stress and fatigue) have been detected as well and call for greater attention to the risk of work intensification (Boxall & Macky, 2014; Godard, 2004; Green, 2004; Knudsen et al., 2011). However, it has also been observed that **both positive and negative effects can occur simultaneously** (Ramsay et al., 2000) since «workers gain improvements and increased job satisfaction while also working harder to meet defined performance standards» (Marchington & Wilkinson, 2005: p. 408). Moreover, it has been argued that the social impact of direct worker participation does not lie in the specific organisational tool. For instance, teamworking can simply mean the multi-skilling of individuals, who still need to follow very standardised procedures and are not granted any autonomy, or it can be structured in a way that enhances the group's room for manoeuvre in planning its work and continuously adapting procedures to meet actual needs (Cressey et al., 2013).

From an **organisational perspective**, we may distinguish between **objective and subjective performance outcomes** of direct worker participation, whereby the former include profits, returns on investment, productivity, growth, etc., and the latter concern quality of products and services, organisational innovation, etc. (Arnal et al., 2001; Looise et al., 2011; Zhou et al., 2019). However, negative impacts on productivity have been associated with direct worker participation, possibly due to greater work intensification (Ramsay et al., 2000; Uribetxebarria et al., 2021). Overall, it has been observed that the empirical evidence of the productivity effects of participation is mixed (Zwick, 2003).

Furthermore, **social and organisational outcomes may be related**, since intrinsic job satisfaction can increase firm productivity and profitability by reducing absenteeism and raising loyalty and motivation (e.g., Bryson, 2017; FitzRoy & Nolan, 2022) and greater procedural fairness can lead to positive effects on both workers' attitudes and performance (Cooper et al., 1992; Lau & Lim, 2002).

Moreover, positive performance outcomes may be redistributed to workers by improving their working conditions and this, in turn, impacts on workers' attitudes and behaviour.

A relevant attempt to align both social and organisational outcomes has been made through the concept of 'workplace innovation', which is described as «an integral set of participative mechanisms for interventions relating structural (e.g., organisational design) and cultural aspects (e.g., leadership, coordination and organisational behaviour) of the organisation and its people with the objective to simultaneously improve the conditions for the performance (i.e., productivity, innovation, quality) and quality of working life (i.e., wellbeing at work, competence development, employee engagement)» (Oeij & Dhondt, 2017: p. 66). In this view, workplace innovation, grounded on worker participation in work organisation, is not an end in itself but a means to achieve organisational performance and working life quality, as well as a process of implementing innovative interventions. Conceptualised as such, workplace innovation practices have been depicted as key to sustainably dealing with disruptive changes, including digital and environmental transitions (Dhondt et al., 2023). **A positive correlation between direct worker participation and digital, environmental and socio-organisational transformation processes** has been found in further literature (Abildgaard et al., 2020; Hunton-Clarke et al., 2002; Litwin, 2011; Rothenberg, 2003; Süßbauer et al., 2019; Vereycken et al., 2021), and mostly explained by the fact that involving workers tends to increase transformation acceptance and favour organisational aspects like innovative behaviour and ideas supporting transitions (Olsson al., 2024; Ullrich et al., 2023; Vereycken et al., 2021; Wengel & Wallmeier, 1999). Interestingly, Cressey et al. (2013) argue that the win-win outcomes of direct worker participation depend upon the creation of opportunities for 'productive reflection', which concerns the use of workers' formal and tacit skills and competences to reflect upon work practices and anticipate the impact of changes.

5.1 Mediating factors and necessary conditions

As regards possible factors mediating direct participation's impact on workers, organisations and transformations, company context (innovativeness, labour intensity, financial situation, market strategy, etc.), workers' intentions and characteristics (as regards e.g., their gender, professional role, autonomy, seniority, etc.), managers' attitudes and actions, institutional framework and trade unions have all been mentioned in literature (Defourney et al., 1985; Deng et al., 2023; Doellgast, 2008; Franca & Pahor, 2014; Gallie, 2013; Gonzalez, 2010; Nielsen & Randall, 2012; Peccei et al., 2005; Zhou et al., 2015). With specific reference to the institutional framework, for instance, the presence of worker representatives and strong participation rights is likely to ensure an application of direct worker participation which is beneficial to workers and does not undermine labour-management trust (Godard, 2004). Interestingly, the role of trade unions appears to be relevant in mediating the effects of direct participation even before their active contribution to the field. Indeed, by providing job security, offering an alternative to employee exit and favouring a positive industrial relations climate, trade unions are expected to help employers retain workers and facilitate their acceptance and

contribution to direct participation practices with positive impacts on performance (Bryson et al. 2005; Valizade et al., 2023).

Importantly, there are also conditions strictly inherent to the implementation of direct worker participation, that are necessary for participatory practices to exploit their full potential in terms of social, organisational and transformation outcomes, such as: clarity and transparency in information procedures with workers about the directions of change, its rationale and its implications at work (Ullrich et al., 2023; Hunton-Clarke et al., 2002); in relation to a specific intervention process, timeliness of workers' involvement and listening to their needs as well as continuous information flows until the end of the process e.g., as regards its results (Hunton-Clarke et al., 2002; Ullrich et al., 2023); provision of punctual feedback to workers' suggestions and actual integration and use of inputs and activities developed by them (Mehmood & Farshchian, 2023; Ullrich et al., 2023); provision of resources, including sufficient knowledge, skills and time, to allow workers to concretely participate (Baykal & Divrik, 2023; Hunton-Clarke et al., 2002; Mehmood & Farshchian, 2023; Ullrich et al., 2023); provision of rewards or incentives for valuable inputs given by workers (Mehmood & Farshchian, 2023; Süßbauer et al., 2019; Ullrich et al., 2023); workers' participation applied to the content (e.g., workers' contribution to the identification of target areas) and/or process (e.g., workers' contribution to the selection of workers participating in change committees) of a specific intervention (Abildgaard et al., 2020); abandonment of rigid and hierarchical organisational structures (Mehmood & Farshchian, 2023); preference for small working groups devoted to continuous improvement and the resolution of problems (Ullrich et al., 2023); avoidance of excessive demands and completely new workloads for workers involved in participation practices (Boxall & Macky, 2014; Süßbauer et al., 2019; Ullrich et al., 2023); **the deployment not of only a single practice but of combination of context-specific (both direct and representative) participation measures, which need to be embedded in depth** (e.g., via frequent meetings, opportunities for upward communication on relevant subjects, etc.) **throughout the whole organisation** (Cox et al., 2006; Cressey et al., 2013; Ullrich et al., 2023).

Partly related to this, it has been moreover observed that **direct participation is unlikely to deliver payoffs unless it is bundled with other human resource policies** like training and job security (see, e.g., Appelbaum et al., 2000; Gollan et al., 2006; Marchington & Wilkinson, 2005; Strauss, 2006; Totterdill, 2015). Moreover, **its effects from a social, organisational and developmental perspective, are better achieved and sustained when it interacts also with forms of indirect participation** (Bryson et al., 2005; Campagna & Pero, 2017; Della Torre et al., 2021; Holland et al., 2011; Looise et al., 2011; Pohler & Luchak, 2014; Cressey et al., 2013). Not only a combination of worker participation practices with deep influence on decision making processes, is more likely to positively impact on organisational commitment and job satisfaction (Cox et al., 2006), but it is the interplay of both representative and direct worker participation that seems to deliver the most sustainable balance between efficiency, equity and voice, and mitigate the potential negative effects of the peculiar interests of labour and management (Pohler & Luchak, 2014). Notably, trade unions are found to impact on the processes of implementation of direct participation, e.g., by strengthening and improving management communications around direct participation practices and ensuring that workers' views are meaningfully included into decision making over direct participation (Cook et al.,

2020; Mowbray et al., 2021; Vernon & Brewster, 2013). In addition, when worker representatives are involved in the introduction of direct worker participation, an increase in performance outcomes (especially economic effects like cost reduction and increase of total output, and indirect labour cost effects like decrease of sickness and absenteeism) has been reported and explained by the positive impact of the involvement of worker representatives on the implementation of direct participation, organisational climate and overall workers' outcomes (Looise et al., 2011). Coherently, representative participation is also found to mitigate possible psycho-social vulnerabilities (like strain and stress) in direct participation initiatives (Cook et al., 2020; Knudsen et al., 2011; Valizade et al., 2023) and ensure that the net benefit of participation (e.g., in terms of economic rewards) to individuals is positive (Bryson et al., 2005; Pohler & Luchak, 2014).

However, the specific nature of the interaction between labour representation and direct worker participation producing the most effective outcomes, remains quite questioned. According to Looise et al. (2011), when worker representatives operate in a given work setting and are consulted about the introduction of human resource policies including direct participation, their action is expected to improve organisational climate (by enhancing trust and workers' readiness to change and reducing inequalities), which in turn influences workers' attitudes and behaviours (towards more collaboration and flexibility and less absenteeism and turnover). These relationships would end up stimulating and increasing the effects of direct participation on organisational outcomes (encompassing productivity, growth, employment, as well as product quality and innovation). Similarly, Valizade et al. (2023) conclude that trade union organisations exerting influence on decision-making in workplaces, tend to lay the foundations for effective high performance work systems, thanks to their positive impact on job security, which then contributes to a positive industrial relations climate. Cressey et al. (2013) refer to a new collective bargaining agenda, where the tacit knowledge and creativity of workers (unleashed by direct worker participation practices) are traded in return for intrinsic quality of working life, including the ability to concretely negotiate business models and targets that support competitiveness. Conversely, Signoretti (2017) observes that there is no need to consult trade unions or involve them in decision-making processes about the introduction of lean methods, since a mere information procedure would ensure positive outcomes for workers and their acceptance of organisational innovations. This picture is further complicated by the variable of company size, since medium firms are found to benefit more than small firms, in terms of innovation, from combining different (direct and indirect) worker participation practices. And this may be explained by the fact that small firms would lack the necessary managerial capabilities to integrate different participation mechanisms. However, in medium firms, an excessive level of formalisation in worker participation (e.g., through written or indirect channels) may be detrimental to innovation processes (Della Torre et al., 2021).

Overall, this debate proves the need for further empirical research on the multidimensional nature of voice and its effects for workers, organisations and transformations. And this is what BroadVoice project focuses on.

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