



# Changing the state of the unions : from solid to liquid unionism. Three cases in North America

Vincent Pasquier

## ► To cite this version:

Vincent Pasquier. Changing the state of the unions : from solid to liquid unionism. Three cases in North America. Business administration. Université Clermont Auvergne [2017-2020], 2019. English. NNT : 2019CLFAD004 . tel-02628532

**HAL Id: tel-02628532**

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>> Ecole Universitaire de Management de Clermont-Ferrand

>> Ecole Doctorale des Sciences Economiques, Juridiques,  
Politiques et de Gestion (ED 245)

>> Laboratoire cleRMA

# **Le syndicalisme dans tous ses états: d'un syndicalisme solide vers un syndicalisme liquide.**

## Trois études de cas en Amérique du Nord.

Présentée et soutenue publiquement le 1<sup>er</sup> février 2019  
Pour l'obtention du titre de Docteur ès Sciences de Gestion

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# Sommaire

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<b>Remerciements.....</b>	<b>5</b>
---------------------------	----------

<b>Résumé .....</b>	<b>7</b>
---------------------	----------

<b>Introduction .....</b>	<b>8</b>
---------------------------	----------

1. Prelude to the introduction .....	9
2. Changing the state of the unions? Theorizing the renewal of unionism as a transformation from a solid to a liquid model .....	10
3. Investigating the transition from solid to liquid unionism .....	18
4. References .....	26
5. Appendix.....	33

<b>Chapter One - Democratic organizations and their monstrous digital self: the use of Facebook by a labour union .....</b>	<b>34</b>
---	-----------

Abstract .....	35
1. Introduction.....	36
2. Social media: a horizon full of promises... and disappointment for the renewal of democratic organizations .....	38
3. Methodology .....	41
4. Results: where the interaction between online and offline democratic processes comes to be interpreted as disharmonious, out of control and illegitimate .....	47
5. Theorizing findings - Online participation and organizational democratic processes: the construction and banishment of the monster .....	63
6. Discussion .....	65
7. Conclusion .....	68
8. References .....	69

<b>Chapter Two - ‘All-singing, all-dancing’: Flashmob unionism as a renewed form of action-oriented unionism.....</b>	<b>73</b>
---	-----------

Abstract .....	74
1. Introduction.....	75

2. Occupy unionism? .....	76
3. Insights from social-movement studies: contrasting two ideal-types of contemporary social movements.....	77
4. Methodology .....	81
5. Results.....	84
6. Discussion .....	94
7. Conclusion: limitations and future avenues for research .....	97
8. References .....	98

### **Chapter Three - From ‘organizing’ to ‘networking’: how the US labour movement is renewing its strategy to reach precarious workers. The cases of the ‘Fight for 15’ and ‘Our Walmart’.....103**

Abstract .....	104
1. Introduction .....	105
2. Key success factors and limitations of the ‘organizing’ model.....	106
3. ‘Fight for 15’ and ‘Our Walmart’ .....	108
4. Research method.....	110
5. FF15: the emergence of an intersectional solidarity bridging model.....	112
6. OWM: the emergence of a solidarity bonding model.....	118
7. Discussion .....	121
8. References .....	124

### **Conclusion.....129**

1. Contribution #1: three metaphors for making sense of the liquefaction of unionism .....	130
2. Contribution #2 – Fluidization or dissolution: how to explain different outcomes for (apparently) similar transformation processes .....	135
3. Contribution #3 – Using social media data to enrich the union renewal literature.....	139
4. Risks and limitations of the ‘epochalist’ liquid metaphor .....	144
5. Avenues for future research.....	145
6. Postlude to the conclusion .....	147
7. References .....	149

# Remerciements

Tout d’abord, je tiens à exprimer toute ma reconnaissance à Bertrand Valiorgue qui a supervisé mes travaux doctoraux à l’université de Clermont Auvergne depuis 2015. Au cours de ces années, Bertrand m’a apporté son soutien avec une constance tout à fait remarquable, contribuant ainsi largement à faciliter ma vie de doctorant. Son savoir théorique et empirique sur les organisations démocratiques aura été pour moi d’une aide décisive. Son rôle de facilitateur m’aura permis de vivre mon parcours au sein de l’UCA de la manière la plus profitable qui soit. Je tiens ici à souligner le rôle qu’a joué la chaire Alter Gouvernance durant mon parcours, véritable laboratoire à idées alternatives où mes travaux sur les nouvelles formes de dialogue social ont été accueillis avec intérêt et bienveillance.

Je souhaite également remercier Thibault Daudigeos, qui a dirigé mes travaux à Grenoble Ecole de Management. A l’instar de Bertrand, Thibault aura été bien plus qu’un simple directeur de thèse : il a été un formidable maître à penser ainsi qu’un support - à la fois intellectuel et émotionnel - de tous les instants. L’image qui me revient constamment pour décrire le rôle joué par Thibault est celle d’un alchimiste, capable en quelques minutes de transformer des problèmes apparemment inextricables en un ensemble de solutions et d’opportunités.

J’adresse également mes remerciements aux membres du jury qui ont accepté de rejoindre mon aventure doctorale : François-Xavier de Vaujany, Florence Palpacuer, François Pichault et Géraldine Schmidt.

Bien que les conventions universitaires invitent à remercier en dernier les « êtres aimés », il me semblerait complètement injuste de ne pas mentionner à ce stade ma compagne Julie. Sans tout son amour et sa patience, il y a tout à parier que je n’aurais pas été en mesure de mener à bien ce projet. Je tiens ici à partager ma fierté et ma joie avec celle qui m’a si patiemment aidé à traverser mes moments de doute et à surpasser mes difficultés.

J’ai également contracté au cours de ce doctorat une très grande dette à l’égard de mes partenaires de recherche québécois, et tout particulièrement Nadia, Julien et Annie. Apparus comme par magie lors d’une conférence à Montréal en 2015, ils m’ont depuis lors apporté tout ce dont un jeune chercheur peut rêver : leur vision fine du monde syndical et de leur organisation, leur temps, leur énergie, et, toute leur sympathie au cours de mes déplacements au Canada.

La richesse de mon aventure doctorale tient également en grande partie aux personnes, aussi brillantes que sympathiques, avec lesquelles j’ai eu l’opportunité de réaliser différents projets de

recherche : Marcos Barros (mon co-superviseur à GEM), Tim Edwards, Stéphane Jaumier (mon « grand frère spirituel »), Vassili Joannides, Christian Lévesque, Marc-Antonin Hennebert, Hélène Picard, Tony Royle, Maria-Laura Toraldo et Mark Smith. Qu'ils en soient remerciés !

Je souhaite également adresser mes remerciements à mes collègues de Syndex – et tout particulièrement au groupe de Lyon – qui auront fait tout leur possible pour faciliter mon projet doctoral et qui m'auront en permanence apporté leur soutien. Que vive leur esprit coopératif !

« Last but not least », je tiens, en guise de remerciements, à dédier cette thèse à mes parents – qui peuvent maintenant dire avec fierté que leur fils, il est docteur ! - ainsi qu'aux deux trésors de ma vie, Léa et Thomas.

# Résumé

Ma thèse questionne la manière dont les syndicats peuvent se renouveler en passant du modèle actuel de syndicalisme « solide » (peu digitalisé, bureaucratique, prévisible, formalisé et inscrit dans le temps long) vers un modèle davantage « liquide » (fortement digitalisé, en réseau, improvisé, flexible et davantage éphémère). Ce travail doctoral est construit autour de trois articles et se nourrit de trois terrains d'enquête. Parmi ces trois cas, le premier est considéré comme un échec et les deux autres comme des réussites.

Le premier article de ma thèse analyse les raisons de l'échec d'un syndicat québécois dans sa tentative de fluidifier son modèle démocratique via l'utilisation d'un groupe Facebook. Il décrit plus précisément comment l'introduction de média sociaux peut donner naissance à des monstres - en l'espèce à des trolls - qui viennent parasiter le fonctionnement démocratique de l'organisation, au point de générer chez les dirigeants syndicaux un sentiment de perte totale de contrôle, d'écœurement et de rejet des « autres ».

Le deuxième article de ma thèse décrypte l'organisation originale du mouvement syndical à succès *Fight for 15*. En s'inspirant des travaux de Bennett et Segerberg (2012) sur les mouvements sociaux hautement connectés, il suggère que *Fight for 15* donne naissance à une forme d'action syndicale hybride, à la croisée des logiques d'action traditionnelles solides et des nouveaux modes d'action hautement liquides. Nous proposons d'appeler 'syndicalisme flashmob' cette logique d'action syndicale inédite, en référence au nouveau genre de performances artistiques pratiquées dans l'espace public dont la réalisation est en apparence spontanée.

Le troisième article de ma thèse compare les facteurs clefs de succès de *Fight for 15* et *OUR Walmart* - les deux mouvements syndicaux les plus innovants et les plus influents aux Etats-Unis lors de ces trois dernières décennies. Nous défendons l'idée que le succès de ces deux mouvements tient au changement de paradigme qu'ils ont opéré, en passant d'une logique « solide » d'organizing à une logique « semi-liquide » de networking.

Au final, en se basant sur deux cas de transformations réussies et un cas d'échec, ces trois terrains d'enquête permettent d'identifier des conditions qui mènent à la fluidification du syndicalisme ou au contraire accélèrent son érosion. D'un point de vue méthodologique, cette thèse identifie également comment les données issues des réseaux sociaux peuvent enrichir le champ des relations industrielles.



# Introduction

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## 1. Prelude to the introduction

When my PhD project began to germinate in the early 2010s, our society seemed to be at the gateway to a new world. A series of largely unexpected social, political and economic revolutions were fundamentally shaking the existing order. This period was marked first by an unprecedented series of social movements which started in North Africa with the Arab Spring, then spread to Spain with Los Indignados, followed by the Occupy movement in the United States, the 'printemps d'Érable' in Quebec and later the 'Nuit debout' in France. These social movements were not only able to overthrow apparently immovable dictatorships but, in many cases, they were also able to open new political horizons. In the wake of these movements, new parties were emerging with the ambition to disrupt – or 'hack' – the political system by supporting direct, participative and horizontal forms of democracy. The Spanish Podemos, the Italian Five Stars movement, the Pirate Parties in Germany, Iceland and Sweden, and the Alternative Danish party, among others, were experiencing unexpected electoral success, entering parliament and, in some cases, almost taking power. Hot on the heels of the changes caused by the financial crisis, a similar shift seemed to be happening in the economic field with the re-invention of commons-oriented and cooperatives models of production, which came to be known by the full-of-promise umbrella term of a 'sharing economy'. A plethora of new and connected communities were also flourishing, bonding people across the world around a rich variety of topics.

These new forms of social movements, political parties, economic entities and communities were all said to share similar collaborative, democratic and fluid organizing principles. They all relied on digital technologies, which had finally made large-scale, horizontal participation become possible.

At a time of increasing disenchantment, when the irresistible forces of liquid modernity (Bauman, 2000) could apparently not be opposed by alternatives or resistance, these large and small revolutions were bringing a welcome fresh wave of hope. So, if ideas such as activism, political engagement, cooperativism or utopian communities that were once considered as belonging to the past, were experiencing a resurgence, why could the 'outdated' and 'dying' unionism not also be capable of such a renewal?

It is precisely to this endeavour that my PhD is dedicated. It is fundamentally by this wave of hope that it has been fuelled.

## **2. Changing the state of the unions? Theorizing the renewal of unionism as a transformation from a solid to a liquid model**

### ***2.1. Assessing the phenomenon: the facts and consequences of the erosion of unionism***

Since its emergence during the first industrial revolution, the history of unionism has been marked by ups and downs, by the alternation of peaks of vitality and, generally long, periods of stability (Friedman, 2007). Nowadays, even if the dynamic of unionism varies greatly across industrial relations systems (Visser, 2008), countries (for example, see Rose and Chaison, 2001 for Canada versus the USA) and economic sectors (notably private versus public organizations and services versus industry – see Bondy, 2018), there is a clear consensus that unionism is going through a phase of global decline. Long-term and cross-national statistics show that unionism started to decline in the early 1980s, a tipping point generally associated with the end of the Fordist compromise and the Reagan–Thatcher neoliberal turn. The decline of unions foremost materializes through the reduction in their membership. After a century of constant growth (1880s–1970s), the total number of union members began to decline during the last two decades of the 20th century (Friedman, 2007). The erosion of union membership is even sharper when considered in relative terms: union density (the ratio of union membership to total working population) in European countries dropped by 13 per cent from 48% to 35% between 1980 and 2008 (see table A in the appendix). At the same time as its declining vitality, unionism has been progressively losing ground at the institutional level. From their comparative study over the last 40 years (from the mid-1970s to the mid-2010s), Baccaro and Howell (2017), for instance, clearly demonstrate that unions are suffering from a loss of institutional power in all the major European employment relations systems.

It may be difficult to clearly isolate the consequences of the decline in unionism, as they are part of more global and complex social, economic, technological and political transformations. Nonetheless, studies suggest that the decline of unionism contributes to job market deregulation, which has many negative consequences in terms of economic justice, employment and working conditions (Doucouliagos, Freeman and Laroche, 2017; Freeman and Medoff, 1984; Jaumotte and Osorio, 2015; Kalleberg, 2009; Quinlan, Mayhew and Bohle, 2001).

Beyond these factual elements, which cry out for a renewal of unionism, it can also be argued that democratic society cannot claim to be complete without a consistent ‘industrial’ democracy. These factual and philosophical reasons make the renewal of unionism a pressing need.

## ***2.2. Making sense of the erosion and renewal of unionism: the structuralist and evolutionist perspectives***

The renewal of unionism has become a central theme in the field of industrial relations over the last 20 years (Murray, 2017). I concur that academic debates about unionism renewal cannot be dissociated from their underlying assumptions regarding the decline of unionism. Discussions about this decline–renewal nexus are generally positioned along a continuum of political ideologies. Those scholars who believe that unionism has been declining because it has become a lukewarm and wishy-washy movement call for its re-radicalization, while those who consider that unionism has been eroded because it has stuck with its old leftist reflexes call for political moderation. Proposals to renew unionism can therefore be positioned between the two ends of the political continuum: from radical to social-democratic, from confrontational to cooperativist, from individualistic to collectivist, or from service-oriented to action-oriented (Reynaud, 1975; Kelly, 1998; Turner, Katz and Hurd, 2001; Fantasia and Voss, 2004; de Turberville, 2004). Nonetheless, I assume that these political divides, which have been shaping the debate about unionism since its very beginning, may be of little help in understanding the current, unprecedented collapse of unionism. Instead of discussing the ‘right’ political orientation of unionism, this dissertation suggests positioning the debate along another fault line which opposes structuralist and evolutionist interpretations of the decline and renewal of unionism.

The structuralist approach is fundamentally based on a cyclical approach to social time. By borrowing from Polanyi’s terminology (1944), structuralists consider that our society swings structurally between a *laissez faire* movement and a regulation counter-movement. The structuralist strand draws a parallel between the current neoliberal age of the early 21st century and the early liberal period of the late 19th to early 20th centuries (Tapia and Turner, 2013; Milkman, 2013). By and large, structuralists consider that bringing unions back into business would imply reconnecting with the ‘good old recipe’ which contributed to the golden age of unionism. As an illustration of this structuralist perspective, McAlevey (2015:417) suggests renewing unionism by taking as a model ‘the successful organizing of the unions of the Congress of Industrial Organization (CIO) during the 1930s’. Taking a further step backwards, Nissen and Jarley (2005:19) describe their new model of social capital unionism as having ‘perhaps ironically, structures and practices more consistent with early (and some contemporary) craft unions or Knights of Labor local assemblies than modern industrial unions’.

In contrast to this structuralist and cyclical view of time, the evolutionist approach in industrial relations is based on a more linear understanding of social change. It assumes that the current unprecedented erosion of unionism is not simply the result of a return to more *laissez faire* times. Rather, it takes the view that the economic and social environment is undergoing fundamental change. The

current decline of unionism should therefore be understood to stem from its maladaptation to this radically new social and economic environment. If it is to survive, the labor movement should therefore try to adapt to this changing context. In this view, the current 'third industrial revolution' would generate a paradigm change equivalent to that from craft to industry (Heckscher, 1996). Based on these assumptions, reconnecting with previously successful union practices – as recommended by structuralists – would result in failure. On the contrary, unionism would need fundamentally new practices to succeed. To paraphrase Baccaro, Hamann and Turner (2003), evolutionist scholars consider that a renewal of unionism foremost requires renewed perspectives. Based on these hypotheses, any efforts to renew unionism should involve to radically question the premises that it is currently based on.

As I will further develop, this PhD dissertation is strongly influenced by these evolutionist assumptions.

### ***2.3. Contrasting the existing model of solid unionism with the imagined liquid model***

Hyman (1999) suggested that rethinking unionism should not merely involve adjusting the existing model. It should instead involve a 'new effort of imagination' (Hyman, 1999:13) to envision a model which would align with the constraints and opportunities of its time. In this section, I will review the evolutionist approaches in industrial relations which take seriously the need to envisage such a radically new model of unionism.

I will mainly rely on Heckscher and McCarthy's (2014) model of collaborative unionism, which they set against the existing industrial model, and to a lesser extent on Freeman and Rogers (2002) who suggest developing an open-source model of unionism, which they contrast with the existing collectivist model. These major imaginative theoretical efforts will be complemented by insights from the fields of organization theory (Clegg and Baumeler, 2010), social movement (Bennett and Segerberg, 2012; Gerbaudo, 2012) and political science (Bennett, Segerberg and Knürpf, 2017) to refine the main parameters of the 'existing' and 'imagined' models of unionism.

I suggest borrowing Bauman's metaphor of liquidity (2000) to understand the difference between these 'existing' and the 'newly imagined' ideal-typic forms of unionism. Liquid unionism will correspond to the ideal-typical model emerging from these conceptual 'imagination efforts'. By contrast, the existing model of unionism will be referred to as being 'solid'. Using Bauman's metaphor is justified firstly because it helps to explain, perhaps better than any other sociological metaphors, the nature of the social changes which have been eroding unionism since the late 1970s (Touraine, 1971; Castells, 1996; Boltanski and Chiapello, 2005; Rosa, 2013). I agree with Bauman (2000:167) that

'the passage from solid to liquid or liquified modernity constitutes the framework in which history of the labour movement has been inscribed'.

Secondly, and more importantly, the use of liquidity as a 'root metaphor' (Cornelissen, 2005) appears to be particularly relevant for our project as the concepts of solid and liquid modernity can easily be connected semantically and conceptually with the two 'existing' and 'imagined' models of unionism. Bauman indeed distinguishes between a heavy, ordered, clearly bound, stable, patient, vertical, rigid and collective – in a word 'solid' – modernity on the one hand and a new, light, in-the-making, blurred, digitalized, unstable, impatient, horizontal, flexible and individualized – in a word 'liquid' – form of modernity on the other. As I will further develop, the different properties attributed to solid and liquid modernity also apply to a very large extent to the two 'existing' and 'imagined' ideal-typic forms of unionism.

In what follows, I elaborate upon evolutionist industrial relations (IR) literature – mainly Heckscher and McCarthy (2014) and Freeman and Rogers (2002) – to contrast the 'existing solid' and 'imagined liquid' models of unionism. Drawing on their speculative and theoretical models, I propose the following six dimensions to distinguish solid from liquid unionism (see table 1): organizational structure, role of information and communication technologies (ICT), time horizon, form of leadership, form of solidarity and the type of collective action.

### ***2.3.1. Organizational structure: from bureaucratic to networked***

The existing 'solid' model of unionism differs, firstly, from the imagined 'liquid' model in its organizational structure.

The Weberian 'solid' bureaucracy is repeatedly described as the typical organizational form adopted by unions (Jarley, Fiorito and Delaney, 1997; Fantasia and Voss, 2004; Voss, 2010). Classical solid bureaucracy is defined by a strictly vertical hierarchy and ordered processes. With impermeable boundaries, it also relies on a clear binary notion of membership: people being either totally in or fully out. Overall, the solid bureaucratic union is best understood as an organization that produces rules to guarantee workers stability and predictability.

The new liquid form of unionism is, on the contrary, expected to adopt a 'networked' organizational structure. Borgatti and Foster (2003:996) describe a networked organizational structure as 'an organization with "new" features such as flat hierarchy, empowered members, self-governing teams, heavy use of temporary structures (e.g., project teams, task forces), lateral communication, etc.'. Unlike the strictly bound union bureaucracy, liquid unionism will rely on a more fluid form of membership, with barriers to joining or leaving being significantly lowered (Bryson, Gomez and

Willman, 2010). Instead of producing stability and predictability, the liquid networked union will support much more innovative, disruptive and emergent types of actions, or as Clegg and Baumeler put it (2010: 16) 'Liquid modernity produces organizations no longer akin to repertory theatre: directorial supervision and surveillance are lacking, roles not well rehearsed, scripts improvised, and performances unpredictable'. Heckscher and McCarthy (2014) refine the description of the liquid union networked structure by suggesting that it could take the form of platforms. This more precise type of network is first defined as being openly accessible and interoperable with other network structures. Platforms are also expected to follow mutualist principles rather than being vertically hierarchical.

This transformation of unions from having a solid bureaucratic organizational structure to a liquid networked structure is expected to be permitted – or at least largely facilitated – by the development of new digital technologies.

### ***2.3.2. The role of ICT: from marginal to central***

The second way in which the solid and liquid models of unionism differ relates to their use of ICT.

Solid forms of unionism are expected to rely only marginally on digital technologies to perform their core processes. In these organizations, the use of digital technologies will only help with digitalizing existing top-down and formalized communications but will not significantly alter their bureaucratic nature. As suggested by Bennett, Segerberg and Knürpf (2017:5) from their research into traditional political parties, the role of digital technologies in solid organizations 'serves to reinforce the conventional model of vertical linkage'. Solid unions will, for instance, adopt digital technologies to communicate in cheaper, faster and more timely ways, but their communication flows are likely to remain centralized and downward (Della Porta and Mosca, 2005; Fowler and Hagar, 2013).

In the liquid model of unionism – whether collaborative (Heckscher and McCarthy, 2014) or open-source (Freeman and Rogers, 2002) – the use of digital technologies is no longer expected to be peripheral or superficial. Unlike in the solid model, liquid unions will instead operate as organizations 'in which technologies of engagement are not just grafted onto existing bureaucratic organization, but actually replace core bureaucratic functions' (Bennett, Segerberg and Knürpf, 2017:3). Digital technologies will then operate as the backbone of liquid unions and will more fundamentally alter the forms of key activities such as decision-making processes, servicing members or collective action (Freeman and Rogers, 2002; Heckscher and McCarthy, 2014; Wood, 2015).

The transformation toward a networked and ICT-intensive form of liquid unionism will therefore necessitate recasting the role traditionally attributed to union leaders.

### ***2.3.3. Leadership: from 'hard' to 'soft' leadership***

The third difference between solid and liquid forms of unionism is their form of leadership.

In solid unionism, leaders tend to behave as bureaucrats who hold their legitimate authority from democratic elections. But apart from these episodic electoral processes through which power is exerted from the bottom, the dominant mode of leadership in solid unions is vertical and hierarchical. Benefiting from the delegation of power from their members, leaders strictly command and control the union's operations from the top down. The solid unionism model therefore supposes a clear division between union leaders who decide and rank-and-file members whose trust in their delegates, requires them to conform and align with the decisions made at the upper echelons. It is only through such a strict division of roles that unions can gain the 'solid' consistency they require (Dean, 2009).

In the much more participatory and decentralized form of liquid unionism, leadership is no longer purely associated with an upper location in the organization chart, but rather with a central position in the union network. Heckscher and McCarthy (2014) suggest naming the new types of leaders emerging in the more liquid form of unionism as 'orchestrators'. The main functions of leaders are no longer to command and control. Instead, the task of an 'orchestrator' is to inspire, to coordinate and to influence, in order to enhance and connect members' initiatives from the bottom up (Clegg and Baumeler, 2010; Gerbaudo, 2012). Related to this change in type of leadership, members of liquid unions are no longer expected to passively wait for instructions from the top. Members' participation, their sharing of ideas and their views as individuals are, on the contrary, encouraged and valued.

Equipped with new organizational structures, guided by new types of leaders and supported by digital technologies which offer unprecedented opportunities, liquid unions also differ from solid ones in their logic of collective action.

### ***2.3.4. From a collective to a connective logic of action***

Fourthly, the emergence of liquid unionism is expected to fundamentally renew the genre of labor collective action.

The logic of solid union activism largely relies on the classical Olsonian logic, according to which only a hierarchically led organization can eventually lead to effective collective action (Bennett and Segerberg, 2012). Heckscher and McCarthy (2014) consider the traditional type of labor action to be characterized as mass and confrontational action, deeply infused with a 'trench war' logic (Dunn, 1990). Strikes, go-slows and job resistance constitute the core arsenal of solid union collective action (Freeman and Rogers, 2002). Being legally constrained and to a large extent ritualized, the 'solid' union



repertoire of industrial action therefore tends to mimic military parades with the union's staff leading the massed rank-and-file, leaving little room for other forms of more surprising and innovative tactics.

Collective action in 'liquid' unions is expected to be guided by a dramatically different logic. Borrowing from the terminology of new military tactics, Heckscher and McCarthy (2014) suggest calling the contentious actions of liquid unions 'swarming actions'. This corresponds to a move from "brute force massing" to more nimble forms of engagement' (Heckscher and McCarthy, 2014:642). This transformation of labor action strongly echoes the work of Bennett and Sergberg (2012) who theorized this evolution as a move from a classical and solid collective logic of action to a new and liquid connective one. In this new form of liquid *connective* action, the repertoire of unions' collective action is expected to be much more diversified, mixing online and offline forms of action and developing tactics other than those based on the pure strength of the rank-and-file.

The changing form of collective action would therefore suggest an equivalent shift in the fuel powering unions' collective action.

### ***2.3.5. Forms of 'togetherness': from mechanical solidarity to organic fluidarity***

The form of solidarity created by unions is the fifth element that distinguishes 'solid' from 'liquid' unions.

Unsurprisingly, the notion of solidarity is absolutely core to the functioning of 'solid' unionism. Heckscher and McCarthy (2014) consider that in solid forms of unionism, the core process of creating solidarity involves creating a unified and homogeneous professional identity: people will act as one because they consider that they belong to the same categories and the same class and suffer from the same injustices as their co-workers. Hyman (1999) calls the dominant form of solidarity created in solid unions 'mechanistic': i.e. workers 'mechanically' act as one because of their perception of having a common identity and a common fate.

In contrast to the type of solidarity that exists in solid forms of unionism, I borrow the concept of 'fluidarity' from McDonald (2002) to name the new kind of 'social glue' that unites individuals in liquid forms of unionism. To make sense of the changing nature of this social glue, Heckscher and McCarthy (2014) compare the solidarity of solid unions to the brotherhood of workers, intended to last forever, and the fluidarity in liquid unions to friendship relations, which are more transient and collaborative in nature. Fluidarity also suggests a move from a mechanical form of togetherness based on similarities toward a more organic form (Hyman, 1999) based on the recognition of differences and diversity. In that sense, transient and diversity-based 'fluidarity' strongly resembles Hardt and Negri's concept (2005) of 'coordinated multitude'.

This move from an everlasting solidarity toward a more transient fluidarity then indicates the changing temporality between solid and liquid unions.

### **2.3.6. Time horizon: from long-term and stable to short-term and transient**

The sixth and final key distinction to be drawn between solid and liquid forms of unionism relates to their respective time horizons.

A long-term horizon prevails in solid unions, as can be suggested by the metaphorical association of their organizational structure with the pyramids or iron cages. Guided and constrained by a range of rules which have stratified over time, solid organizations feature a low propensity for change. This time orientation may be related to their core mission, which to a great extent aims to ensure that the existing rules are actually enforced. Solid unions then primarily aim at producing a stable and predictable environment for workers (Clegg and Baumeler, 2010).

Aligned with their project-based orientation, liquid unions will, on the contrary, be focused on a much shorter-term horizon. In times of solid modernity, the long-term horizon of unions was congruent with the Fordist mode of production, which was also based on predictability and stability (Bauman, 2000). But in times of liquid modernity, capitalist organizations are evolving at an ever-faster pace. Consequently, solid unions tend to be always lagging behind and prove to be incapable of having a grasp over more liquid forms of management and operations. Liquid unions will then make their own liquid modernity principles according to which ‘people who move and act faster, who come nearest to the momentariness of movement, are now people who rule’ (Clegg and Baumeler, 2010 :4). Heckscher and McCarthy (2014) are aware of this new challenge imposed by an ever-changing economic order. They suggest that the time horizon of the new model of unionism may only be transient.

**Table 1 – contrasting existing solid and imagined liquid models of unionism**

<i>State of the union</i> <i>Dimensions</i>	Existing solid	Imagined liquid unionism
<i>Organization structure</i>	Pyramidal bureaucracy	The network
<i>Role of ICT</i>	Marginal	Central
<i>Leadership</i>	‘Hard leadership’ – command and control	‘Soft leadership’ – inspire, influence and connect
<i>Collective action</i>	Collective – <i>Planned and ritualized like military parade</i>	Connective – <i>emergent and surprising like swarming action</i>
<i>Form of solidarity</i>	Mechanistic solidarity	Organic fluidarity
<i>Time horizon</i>	Long-term and stable	Short-term and transient

Our overview of the evolutionist literature in industrial relations helps us to imagine the form of a future, more liquid model of unionism, to be contrasted with the solid existing one (see table 1). But the formulation of these two ideal-typical forms of unionism leaves open, at least, two key questions.

First, as the liquid model of unionism is foremost speculative, actual attempts to liquify unionism may well give birth to a model that is quite different to the one imagined by IR scholars. Heckscher and McCarthy (2014) notably suggest that the union liquefaction process could engender intermediary and hybrid forms in-between the solid and liquid ones. One could therefore ask how best to describe the form that renewed unions take through their attempts to move toward more liquid models.

Second, the transformation process from the solid to the liquid model of unionism remains totally in the dead angle of this literature. But, as the Darwinian evolutionist model teaches us, not all species manage to successfully engage in a transformation process and to survive. From this perspective, one may ask the question what are the parameters that lead to a positive transformation process – or, in our case, which conditions lead to positive fluidization of unionism and which lead to negative dissolution of unionism.

Considering these two questions, this PhD dissertation aims primarily to theoretically show **how unionism can renew by moving from the ‘existing solid’ model to an ‘imagined liquid’ model.**

### **3. Investigating the transition from solid to liquid unionism**

To tackle the grand puzzle set out above, I propose to investigate the question of union renewal from three complementary theoretical angles, each informed by a specific empirical study (see figure 1).

These angles are covered in this dissertation by three complementary empirical chapters. They are complementary, first, because they relate to specific and relatively independent discussions about the renewal of unionism in industrial relations. Chapter 1 is focused on the renewal of unions as democratic organizations. Chapter 2 discusses the renewal of unions as social movements and chapter 3 considers the variety of unionism renewal.

Second, these three chapters are complementary because of their respective focuses on one specific dimension of models of unionism (see figure 1). Chapter 1 concentrates on the role played by ICT in the process of renewal of unionism and questions the transformation of the organizational structure, leadership and time horizon of unions. Chapter 2 questions the renewal of unions’ collective action and investigates the evolution of their organizational structure, leadership and the role of ICT. In

chapter 3 we focus on the renewal of unions' form of solidarity and study the evolution of their organization structure and leadership.

The complementarity of these studies is further strengthened by the diversity of their context (see figure 1). Chapter 1 investigates the renewal of unionism in the 'solid' context of a public administration in Quebec in which industrial relations are well established and employment is globally stable. Chapters 2 and 3 investigate cases located in a much more liquid environment, namely the fast-food sector and the retail industry in the US, which are both characterized by the quasi-absence of industrial relations and highly precarious employment.

Last, this dissertation uses a consistent methodology as the three empirical research projects rely on mixed methods, using interviews as well as qualitative and quantitative social media data.

I will present the specific relevance of each of these chapters to the debate about the renewal of unionism. I will also provide an overview of the empirical and methodological settings and briefly summarize their main contributions.

**Figure 1 – Overview of the research focus in the three empirical studies**

<b>Research question:</b> how is unionism renewing by moving from its existing 'solid' model toward a new liquid one?			
	<b>Chapter 1</b>	<b>Chapter 2</b>	<b>Chapter 3</b>
<i>Related sub-field in industrial relations</i>	Renewal of unions as democratic organizations	Renewal of unions as social movements	Variety of unionism renewal
<i>Key conceptual dimension</i>	<b>Role of ICT</b>	<b>Collective action</b>	<b>Forms of solidarity</b>
<i>Related conceptual dimension</i>	Org. Structure Leadership Time horizon	Org. Structure Leadership Role of ICT	Org. Structure Leadership
<i>Context</i>	Stable + established industrial relations <i>(Quebecois public administration)</i>	Precarity + no industrial relations <i>(US Fast-food sector)</i>	Precarity + no industrial relations <i>(US Fast-food sector + US retail sector)</i>
<i>Methodology</i>	Single case study Mixed-method Facebook group	Single case study Mixed-method Twitter	Comparative case study Mixed-method Facebook page

### **3.1. Chapter 1: toward more liquid forms of democracy?**

Chapter 1 will investigate how the solid model of union democracy can evolve toward a more liquid form by adopting information and communication technologies.

Democracy, with its overall objective to give workers a voice in 'autocratic' organizations, lies at the heart of the values of unionism (Voss, 2010). Quite naturally then, most unions have been choosing to operate through a democratic form of governance. Nonetheless, most studies show a gap between the democratic principles of unions and their actual practices. The solid form of union democracy has been proven to be governed centrally by a professional 'oligarchical' elite and to operate through only episodic and biased moments of participation (Martin, 1968; Strauss; 1991). A few cases of 'good' union democracy have been evidenced (Lipset, Trow and Coleman, 1956; Edelstein and Warner, 1976; Voss and Sherman, 2000), but they remain the exception rather than the rule. Studies of union democracy therefore tend to strongly confirm Michels' iron law (1915), according to which any democratic organization will end up functioning as an oligarchy.

From the early 2000s, the development of ICT has been raising hopes of finally defeating this apparently inescapable law. It was expected that these technologies would enable unions to overcome the univocal, opaque, centralized and expert-based functioning of their solid democracy and to substitute it with a pluralist, transparent, participative and distributed – i.e. 'liquid' – form of democracy (Lee, 1996; Diamond and Freeman, 2002; Carter et al., 2003).

But contrary to this initial wave of hope, empirical research has shown that new technologies have not been transforming union democracy. From Ward and Lusoli (2003), who compare unions to dinosaurs in the cyberspace, through Fowler and Hagar (2013), Panagiotopoulos and Barnett (2015) or Rego et al. (2016), who evidence insufficient interactive use of digital technologies by unions, to Martinez-Lucio and Walker (2005) or Kerr and Waddington (2014), who point out the very limited transformational potential of digital technologies, the image drawn by most empirical work is that of inertia and disenchantment rather than change and fluidification.

The maintenance of a solid democratic order despite the potential offered by digital technologies to alter and challenge it seems to be a rather paradoxical phenomenon. Indeed, how is it possible for voices expressed through the Internet to be so easily ignored? How can union leaders exert top-down control over the digital space when it offers little power to limit individual expression? Chapter 1 hence tries to unravel this theoretical puzzle, namely to understand why technologies which offer the potential to alter the existing solid model of union democracy have apparently failed to do so. Chapter 1 will focus therefore on the following research question: **how does members' participation in social media affect democratic processes?**

To address this question, for two years (November 2014 to September 2016), we followed the case of a labor union which set up a Facebook group in an attempt to modernize its existing democratic

processes. The union represents low- to mid-qualified workers from the Quebecois public administration. The Facebook group eventually attracted about 12% of the 40,000 union members (about 5,000 people) and generated the equivalent of 2,500 pages of discussion (about 1.4 million words). We carried out a mixed-methods investigation using the messages and comments posted on the Facebook group, 35 face-to-face interviews with union leaders and active Facebook group participants, as well as 15 monthly meetings with the Facebook group managers.

Our empirical investigation shows that the attempt to fluidify the solid union democracy by using digital technologies failed, giving birth to an organizational monstrification process (Cohen, 1996; Thanem, 2011). For online participants, the union came to be perceived as a monstrously outdated and autocratic Leviathan governed by oligarchs who were breaking the ideal of a member-based democratic organization. Union leaders came to see the Facebook group as a monstrously disharmonious and threatening space populated by trolls who were disgustingly breaking the norms of 'good democratic participation'. Being confronted with a monstrous phenomenon, union leaders had no other option than to try to keep at bay the beast that they had created by implementing an even stricter form of regulation.

By metaphorically comparing the interaction between online participation and existing democratic process to a monstrification process, our paper aims to contribute to existing literature in two directions. It first provides a fresh look to academic discussions about digital technologies in democratic organizations by suggesting that online participation may introduce a new, more horizontal and more individualistic democratic approach which may seriously clash with the existing, representative, hierarchical and collectivist logic of democracy. It second contributes to literature about monstrous organizations by providing a theorization of the monstrification process in organizations.

### ***3.2. Chapter 2: toward more liquid forms of unions' collective action?***

Chapter 2 investigates the renewal of unionism as a social movement. It questions more precisely how the solid logic of union collective action may evolve toward a more liquid and connective logic.

Available statistics clearly show that the capacity of unions to mobilize started to plummet from the beginning of the 1980s, reaching its lowest point over the last 120 years in the 2000s (Friedman, 2007). A parallel is often drawn between their eroding ability to mobilize and the more global trend toward individualism and disengagement (Putnam, 2001) that characterizes our ever more liquid world (Bauman, 2000). Some believe that the barriers to collective action have become so important that they even recommend giving up on union activism altogether (de Turberville, 2004).

Nonetheless, the wave of social movements which emerged with the Arab Spring in the 2010s and then spread to Europe and North America have clearly shown that our liquid societies will not prevent large-scale collective actions. Academic study of these movements instead revealed that collective actions were still possible if they followed a radically new and more liquid logic (Bennett and Segerberg, 2012, Castells, 2012; Gerbaudo, 2012; Milan, 2015). Chapter 2 therefore investigates how the liquid and connective logic (Bennett and Segerberg, 2012) arising from these new social movements can serve as a model for renewing the existing solid logic of union activism. More precisely, it aims to study **how to characterize the renewed forms of action-oriented unionism that draw inspiration from contemporary social movements.**

To do this, we investigate the US campaign *Fight for 15* (FF15), which has broadly been inspired by contemporary social movements such as Occupy Wall Street. Since its inception, the FF15 movement has been backed by the Service Employees International Union (SEIU) – a major US union operating in the service industries. The core aim of FF15 is to raise the minimum wage to US\$15/hour. The movement started in the highly precarious fast-food industry, which is almost a union desert. Since its emergence in 2012, FF15 has had stunning victories, with the states of California and New York and Seattle and many other US cities being engaged in the process of raising their minimum wage to US\$15/hour. In order to capture the diverse dimensions of this innovative labor movement, we designed a mixed methodology which combines interviews with qualitative and quantitative data harvested from the ‘#FightFor15’ Twitter discussion.

Our study suggests the emergence of a new type of union social movement, best understood as a hybrid form between the ‘solid’ and collective logic and the ‘liquid’ and connective one. We propose metaphorically naming this novel form of action ‘flashmob unionism’ in reference to the new genre of dance events performed spontaneously in public spaces (Gore, 2010). As we show through FF15, flashmobs as a dance performance and as a type of collective union action have striking similarities. They both rely on surprising, ephemeral and viral tactics, are organized using a loose network and are coordinated hierarchically and behind the scenes. They both use the spontaneous participation of ordinary people and aim to remove traditional barriers to participation.

### ***3.3. Chapter 3: investigating the variety of fluidified unionism***

Chapter 3 investigates the variety of unionism renewal strategies. More precisely, it aims at depicting the various solidarities that unions can create when they become more liquid.

The literature about the renewal of unionism has already identified a variety of renewal strategies (Frege and Kelly, 2003; Murray, 2017). For about 30 years, ‘organizing’ has arguably been presented



as one of the most promising and most popular tactics in the US, and later in the UK, for enhancing the renewal of unionism (Bronfenbrenner et al., 1998; Heery et al., 2000). This strategy is broadly defined as an attempt to ‘reach the hard-to-reach workers’ in order to unionize them (Martinez-Lucio, Marino and Connolly, 2017).

Beyond this broad and generic definition, the literature suggests that an ‘organizing’ strategy can have different models. One of the key differences between the different organizing models relates to the vertical hierarchy of their organizational structures. Hickey, Kuruvilla and Lakhani (2010) suggest distinguishing between three different models of ‘organizing’. The first, ‘top-down’ model is said to be led centrally by union staff. In the second, ‘bottom-up’, model, the locus of power is no longer union officials but the workers themselves. The third model results from ‘a combination of top-down and bottom-up strategies’ (Hickey, Kuruvilla and Lakhani 2010:4).

While Hickey, Kuruvilla and Lakhani (2010) show from their meta-analysis that the efficiency of these three organizing models can vary significantly according to the industrial relations environment, the literature also repeatedly evidences that in highly liquid, low-paid and precarious service industries none of these models has managed to significantly scale up and be sustained beyond episodic or geographically limited campaigns (Martinez-Lucio, Marino and Connolly, 2017; Simms, 2012). In those industries where the precariat flourishes (Standing, 2016), there are many structural barriers to ‘organizing’, including workforce fragmentation, high employee turnover, low professional identification and harsh managerial practices. One may then conclude that it is structurally impossible for unions to organize this sector. But some argue that large-scale mobilization in precarious and low-paid industries would still be possible if ‘organizing strategies’ managed to manufacture novel forms of solidarity (Hyman, 1999; Simms, 2012). **In Chapter 3, we therefore investigate how ‘organizing’ initiatives can succeed in scaling up in precarious, low-wage and labor-intensive industries.** In other words, we study the variety of solidarity-creating strategies that may succeed in highly liquid economic sectors.

To do so, we investigate the cases of *Our Walmart* (OWM) and *Fight for 15* (FF15). These two US ‘organizing’ initiatives emerged in the retail and fast-food sectors, respectively – two low-paid service industries strongly associated with the rise of the precariat, ‘low road employment’ practices (Hocquelet, 2014; Royle, 2010) and with a long and sophisticated track record of union busting (Lichtenstein, 2009; Royle, 2002; 2010). The two initiatives share further commonalities: they have been backed by traditional labor unions; they have been praised for their innovative stance; they have found a way to scale up and reach a large audience; and they have both achieved some significant – albeit different kinds of – successes for workers. For example, OWM, which has focused on one single

employer (the world's biggest private employer) has managed to win pay increases and other concessions from the employer. The FF15 movement, focused on an entire sector rather than a single employer, has had significant political victories, such as minimum wage rises, across a number of cities and states. Our comparative inquiry into the two campaigns adopts a mixed methodology, based on 54 interviews and an analysis of online organizational discourse.

This paper contributes to the debate about the variety of unionism renewal strategies by evidencing two original and more liquid forms of 'organizing'. We use the term 'professional solidarity bonding' to describe the model developed by OWM and define it as a crowd-sourced network focused on workplace-based solidarity. To describe the FF15 case, we use the term 'intersectional solidarity bridging', which we define as a 'grasstop' network based on intersectional and citizen forms of solidarity. We also suggest that these two labor initiatives have succeeded where their predecessors failed because they shifted from a solid 'organizing' to a liquid 'networking' paradigm. Despite their marked organizational and discursive differences, they both share two characteristics. First, they show a clear move towards a networked organizational form, which implies an increasingly blurring hierarchy, processes and boundaries. Second, they formulate a discourse which has enabled the coordination of 'the multitude' rather than imposing a unified and fixed collective identity.

**Figure 2 – Overview of the contributions of the three empirical studies**

<b>Research question:</b> how is unionism renewing by moving from its existing 'solid' model toward a new liquid one?			
	<b>Chapter 1</b>	<b>Chapter 2</b>	<b>Chapter 3</b>
<b>Research question</b>	How members' participation in social media affects democratic decision-making processes?	How to characterize the renewed forms of action-oriented unionism that draws inspiration from contemporary social movements?	How 'organizing' initiatives can succeed in scaling-up in precarious, low wage industries and labour-intensive industries?
<b>Empirical fields</b>	The <i>SFPQ</i> - a union in quebecois public services	The <i>Fight for 15</i> movements	The <i>Fight for 15</i> and <i>OUR Walmart</i> movements
<b>Contributions</b>	>> Online participation making democratic process monstrous  >> The monstrification process as the brutal confrontation between the existing and mostly offline logic and the new digital one	>> A novel form of action-oriented unionism called <i>flashmob</i> unionism  >> <i>Flashmob</i> unionism as a novel approach to union mobilization strategy; organization structure; framing strategy and expansion tactics	>> A success explained by a move from an 'organizing' to a 'networking' paradigm  >> Two new strategies for creating labor solidarity: 'intersectional solidarity bonding' and professional solidarity bridging'

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## 5. Appendix

**Table A - Evolution of the membership and density of labour unions and political parties in Europe**

Country	Period	Labour unions			Period	Political parties		
		Change in density*	Membership variation**	membership variation in %		Change in density*	Membership variation**	membership variation in %
Austria	1980-2008	- 49	- 422	- 29	1980-2008	- 39	- 423	- 29
Belgium (G)	1980-2008	+ 6	+ 425	+ 26	1980-2008	- 38	- 191	- 31
Denmark (G)	1980-2008	- 16	+ 121	+ 8	1980-2008	- 43	- 109	- 40
Finland (G)	1980-2008	+ 1	+ 201	+ 15	1980-2006	- 49	- 260	- 43
France	1980-2008	- 59	- 1 475	- 45	1978-2009	- 63	- 924	- 53
Germany	1980-2008	- 45	- 1 678	- 21	1980-2007	- 49	- 532	- 27
Greece	1980-2008	- 40	+ 63	+ 10	1980-2008	+ 107	+ 335	+ 149
Ireland	1980-2008	- 46	+ 61	+ 12	1980-2008	- 60	- 51	- 45
Italy	1980-2008	- 32	- 1 439	- 20	1980-2007	- 42	- 1 451	- 36
Netherlands	1980-2008	- 45	- 81	- 5	1980-2008	- 41	- 121	- 28
Norway	1980-2008	- 10	+ 279	+ 30	1980-2007	- 66	- 285	- 62
Portugal	1980-2008	- 63	- 657	- 45	1980-2008	- 22	+ 4	+ 1
Spain	1980-2008	+ 28	+ 1 769	+ 159	1980-2008	+ 263	+ 1 208	+ 375
Sweden (G)	1980-2008	- 12	- 209	- 7	1980-2008	- 54	- 241	- 47
Switzerland	1980-2008	- 36	- 146	- 17	1977-2007	- 55	- 178	- 43
United Kingdom	1980-2008	- 47	- 5 000	- 42	1980-2008	- 68	- 1 118	- 66
<b>Ponderated total</b>	<b>1980-2008</b>	<b>- 28</b>	<b>- 8 188</b>	<b>- 18</b>	<b>1980' - 2010'</b>	<b>- 42</b>	<b>- 4 337</b>	<b>- 28</b>
<i>Ponderated total excluding 'Ghent' countries (G)</i>	<i>1980-2008</i>	<i>- 32</i>	<i>- 8 726</i>	<i>- 22</i>	<i>1980' - 2010'</i>	<i>- 41</i>	<i>- 3 535</i>	<i>- 27</i>

Sources: for labour unions ICTWSS data base; for political parties van Biezen et al, 2012

\* *Change in density* : for labour unions = union membership / total workforce; for political parties: party members / voting population

\*\* *Membership variation* : in thousands

# Chapter One

Democratic organizations and their  
monstrous digital self: the use of Facebook  
by a labour union

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## Democratic organizations and their monstrous digital self: the use of Facebook by a labour union

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### ***Abstract***

This paper investigates how existing democratic organizations may be altered by members' participation on social media. To do so, over a two-year period we studied a labour union that opened a Facebook group to modernize its democratic functioning. Unexpectedly, union leaders came to take seemingly completely undemocratic decisions, such as banning members from the Facebook group. To make sense of this 'surprising' decision, we describe how both union leaders and online participants socially construct this online–offline assemblage. We argue that three types of interpretation have played a pivotal role in this process: the perceived harmony between online and offline processes, their perceived controllability, and the legitimacy attributed to the 'others'. We then theorize the online-offline interaction within the union democratic process as a monstrification process, with both union leaders and online participants eventually interpreting it as a disharmonious and uncontrollable phenomenon led by illegitimate actors. Union leaders then come to believe they have no option other than to ban the 'trolls' to keep the digital beast they have created at bay.

**Keywords:** democratic organizations; social media; monstrous organizations

### **Conference presentations**

**AIMS** - Association Internationale de Management Stratégique (June **2017**) in Lyon; **EGOS** - European Group of Organization Studies (July **2017**) in Copenhagen; **SASE** - Society for Advanced Socio-Economics (June **2018**) in Kyoto

*“Social media gives legions of idiots the right to speak when they once only spoke at a bar after a glass of wine, without harming the community. Then they were quickly silenced, but now they have the same right to speak as a Nobel Prize winner. It's the invasion of the idiots.”*, Umberto Eco, during a discussion with journalists on the 10<sup>th</sup> of June, 2015.<sup>1</sup>

*“Ok, we will chat about it on the sly with a glass of wine without disturbing those who know what is good for us”* posted on the 15<sup>th</sup> of February, 2015, in reaction to the removal of comments in a Facebook group managed by a labour union.

## 1. Introduction

In the early 2000s, information and communication technologies (ICT) were celebrated as an effective means for solving an enduring problem of democratic organizations, namely the inescapable centralization of power in the hands of a few and the associated decline in members' participation (Michels, 1915). By widening access to participation and information, it was thought that ICT would disrupt the too-often oligarchical functioning of democratic organizations (Diamond & Freeman, 2002; Shirky, 2008) and enhance large-scale, more direct and egalitarian forms of democracy, thereby supporting the creation of ideal “Habermasian” deliberative spheres (Dahlberg, 2001).

However, empirical works have evidenced a more complicated reality and a rather paradoxical phenomenon. Far from improving organizational democracy through constructive, deep and inclusive debates, ICT can on the contrary pave the way for unbridled and unconstructive online participation (Wilner, Christopoulos & Alves, 2017). Nonetheless, while ICT tends to create online democratic “chaos”, it may have only very limited impact – if any – on existing democratic processes (Hindman, 2008; Chadwick, 2011). Yet, the literature falls short in explaining this paradoxical coexistence of a maintained democratic order with online participative chaos. **We therefore set out to study how members' participation on social media interacts with existing democratic processes.** More precisely, by adopting a social constructivist perspective, we empirically investigate how both leaders and online participants interpret the interactions between online and offline processes and how they act and react accordingly.

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<sup>1</sup> La Stampa (11th of June 2015). Umberto Eco: “Con i social parola a legioni di imbecilli”. Retrieved at : <http://www.lastampa.it/2015/06/10/cultura/eco-con-i-parola-a-legioni-di-imbecilli-XJrvezBN4XOoyo0h98Efij/pagina.html>

To do this, over a two-year period (November 2014 to September 2016) we studied the case of a labour union which opened a Facebook group in an attempt to modernize its existing democratic processes. The Facebook group eventually attracted approximately 12% of the 40,000 union members (about 5,000 people) and generated the equivalent of 2,500 pages of discussions (about 1.4 million words). In addition to these messages and comments posted on the Facebook group, our empirical material consisted of 35 face-to-face interviews with union leaders and active Facebook group participants, as well as 15 monthly meetings with the Facebook group managers. We adopted a “time-bracketing” analytical strategy (Barley, 1986; Langley, 1999) to study how online participation interacted with existing offline activities throughout the various phases of the democratic process.

From the results of our study, we suggest that three types of interpretation by both union leaders and online participants have played a pivotal role throughout this process: the perceived harmony between online and offline processes, their perceived controllability, and the legitimacy attributed to ‘others’. Our empirical findings demonstrate that, on both sides, these interpretations became those of disharmony, uncontrollability and others’ illegitimacy. For online participants, the existing democratic process came to be interpreted as biased and falsely democratic, being in the hands of a selfish and manipulative oligarchy whose behaviour violated the ideals of a member-based democratic organization. For union leaders, the Facebook group came to be seen as a disharmonious and threatening space populated by trolls who were offensively breaking the norms of ‘good democratic participation’. In order to tame their digital creation, union leaders felt they had no other option than to implement seemingly totally undemocratic practices, such as the banishment of online participants and removal of messages. We then propose to theorize this interaction between online and offline processes as a monstrification process (Cohen, 1996; Thanem, 2011), best characterized by the progressive and mutual rejection of object ‘others’, ultimately resulting in their elimination or repudiation.

By metaphorically comparing to a monstrification process the interaction between online participation and existing democratic processes, our paper aims to contribute to existing literature in two directions. It first provides a fresh perspective on academic discussions regarding digital technologies in democratic organizations by suggesting that online participation may introduce a new, more horizontal and more individualistic democratic approach which may seriously clash with the existing, representative, hierarchical and collectivist logic of democracy. Second, the paper contributes to literature about monstrous organizations by providing a theorization of the process of monstrification in a particular organization.

## **2. Social media: a horizon full of promises... and disappointment for the renewal of democratic organizations**

The growing literature concerning ICT and democratic organizations has evolved through two main phases. After an initial and highly enthusiastic period of speculation about the possibilities offered by ICT to renew organizational democracy, empirical studies have evidenced a much more complicated and somewhat paradoxical reality.

### ***2.1. Initial speculation: the right technological solution to enduring democratic problems***

So far, most of the literature focusing on ICT and existing democratic organizations has tried to assess the potential of new communication technologies to modernize and renew their functioning. In its early stages, the Internet raised major hope for the renewal of organizational democracy (Shostack, 1999; Lee, 1996; Shircky, 2008; Chadwick, 2009). Scholars saw in these new technologies a way to dramatically reduce the cost of large-scale democratic participation. ICT was seen as the appropriate technology to solve an enduring organizational problem in democratic organizations (Greene, Hogan & Grieco, 2003).

It was thought that, as a result, members of democratic organizations would be able to access plentiful and timely information. The removal of time and space constraints was also expected to facilitate members' involvement in democratic processes. Thanks to ICT, anyone, at any time and from anywhere would be able to share his or her opinion, experience and questions with other members. The much-improved access to participation was then expected to create a greatly improved deliberative sphere where every member would be on an equal footing (Dahlberg, 2001). As an illustration of this highly enthusiastic and mostly speculative literature, Diamond and Freeman prophesized in 2002 that "the Internet can improve union democracy and accountability to members in ways that challenge Michels' 'iron law of oligarchy' on the organizational form of union" (p583). However, the accumulation of empirical studies has progressively evidenced a different reality regarding the alteration of existing organizational democracy through the introduction of new technologies.

### ***2.2. Opening external avenues to get around existing democratic oligarchy***

Empirical investigation has shown that the Internet can be an effective tool for externally challenging existing democratic organizations by enabling a resistance movement or by supporting the emergence

of new democratic forms. It can be a potential trigger for the emergence of counter-democratic movements which can challenge existing democratic organizations from the outside. The case of Liverpool Dockers (Carter et al., 2003), for instance, documents how a dockers' resistance movement was able to develop outside the traditional labour union channel and offer an alternative vehicle to counter decisions made by union officials. Saundry, Stuart and Antcliff (2007) similarly examined the case of a grassroots dissent movement coordinated online in order to bypass the oligarchical constraints of labour unions. On a larger scale, the recent wave of flat and distributed democratic counter-movements, such as Occupy in the US or Los Indignados in Spain, is said to have been enabled by flat and distributed technologies such as social media (Bennett & Segerberg, 2012; Castells, 2015; Gerbaudo, 2012; Juris, 2012). As such, the Internet is able to alter existing democratic organizations from the outside as protesters now have access to alternative media that can bypass existing and highly controlled democratic channels.

As well as providing means for triggering counter-movements, ICT has also been presented as a technology that supports the creation of new democratic forms (Morozov, 2013). These new forms of democratic organizations are best exemplified by the pirate parties that have recently flourished in Northern Europe. These ICT-based political parties wish to foster the direct engagement of lay-members in order to mitigate the roles of representatives in an attempt to break the famous "iron law of oligarchy". One of the central innovations developed by these parties is to offer members different forms of engagement through new technologies. Lay-members can either directly involve themselves in online political processes or they can delegate their power to someone else if they feel they lack the time or competencies required. By facilitating access to political processes through technologies, these ICT-based democratic organizations expect to avoid the oligarchical trap that prevails in traditional forms of representative democracy.

### ***2.3. The paradox of the existing democratic organization's digitalization***

While ICT can clearly open avenues to externally challenge democratic organizations, empirical studies focusing on the evolution of internal democratic practices have evidenced a highly paradoxical situation, with one stream of research underlining the emergence of democratic online "chaos" and the other suggesting a very limited impact on the pre-existing patterns of democratic organizations. A first group of studies narrowly focused on the dynamic of online democratic initiatives. It has often been suggested that ICT would lead to a democratic dead-end. Online political discussions launched by existing democratic organizations are characterized above all by a high degree of misbehaviour, mainly because of the anonymity they provide (Janssen & Kies, 2005), the difficulties in moderating



abundant flows of exchanges (Wright, 2006; Halpern & Gibbs, 2013) or the frustration that arises from seeing that participation does not generate immediate results (Bryer, 2011).

Online political spaces are also characterized by a highly unequal distribution of participation among members. Scholars have shown that the majority of contributions are made by a limited number of core participants (Janssen & Kies, 2005). Nuancing these globally negative conclusions, some scholars have shown how the configuration of online spaces (ex-ante or ex-post moderation, anonymity, size) might positively or negatively influence the quality of political deliberation. Nonetheless, most empirical studies agree that online spaces offer – to a greater or lesser extent – a poor Habermasian deliberative sphere. Early expectations of seeing an improvement in deliberation through technology have therefore been lowered considerably.

A second and relatively marginal stream of research has analysed the issue from a more global perspective. Through this more general lens, empirical studies have found that the adoption of new communication technologies has had only a limited impact – if any – on the overall pre-existing democratic functioning (Hindman, 2009; Fowler & Hagar, 2013; Chadwick, 2011; Kerr & Waddington, 2013). The reasons for the limited effects of ICT on existing democratic organizations have generated little debate within academia. However, contributions trying to tackle this issue all seem to converge on a similar set of explanations: existing democratic organizations would not use the Internet interactively because they are likely only to replicate online their existing top-down patterns. Della Porta and Mosca (2005) summarize perfectly this view when they write that "organizations with a longer history would be more reluctant to adopt computer-mediated communication or, even when they do, they continue to use it similarly to the old media of communication without exploiting many of its more innovative aspects such as interactivity" (p169).

The juxtaposition of these research results offers an intriguing paradox. On the one hand, when analysed from a global perspective, the research concludes that online participation neither alters nor challenges the existing democratic organizational order. On the other hand, when focusing more narrowly on online initiatives alone, scholars tend to find that e-participation paves the way for misbehaviour by participants, thus creating online democratic chaos.

**We next study empirically how members' participation on social media interacts with democratic processes.** More precisely, we propose to adopt a social constructivist lens to better understand how actors' interpretations and actions socially build the online–offline assemblage. In that perspective, we will investigate how both union leaders and online participation interpret the interaction between

democratic online and offline processes and how both types of actors act and react accordingly. To enlighten this phenomenon, we investigate the case of a Facebook group managed by a labour union.

### 3. Methodology

#### 3.1. Research setting

Our case study concerns a Canadian labour union, representing 40,000 blue-collar workers in the public administration, mainly secretaries, technicians or low- to mid-skilled administrative staff. The labour union has been created in 1962 and since then possesses a democratic governance structure. The union democratic model was described by our interviewees as being bureaucratic and centralized. The bureaucratic and rules orientation of the union has been summarized as follow: *“The union functioning is to a great extent articulated to statuses and rules (...). The whole structure is really very much embedded into this. When we consider an organizational change, we first ask ‘what will be the impact on our status and rules?’ (STg)”*. The union democracy model was second defined as very indirect and relatively centralized. According to a staff member, *“there is a cultural gap between the 1,800 people involved in the union structure and the remaining 40,000 members. It is normal to have such an organizational structure. But it is somewhat disconnected from the shop floor reality. (...) From my political scientist background, I would call the union democracy an ‘insiders’ democracy’ (STg) »*

The union opened a Facebook group at the beginning of a two-year democratic process. The democratic process took place throughout the round of negotiations between the union and the government. This round of negotiation was a particularly key event for the union, as it aimed to renew the employees’ collective agreement. This negotiation would then set the salary increases and working conditions of its members for the next five years. It is in this context that the union decided to set up a Facebook group late 2014, at the beginning of the negotiation process.

Facebook groups operate as forums, where any member can post text, pictures or video messages. Facebook groups also allow members to react to messages by posting a comment or by “liking” the message. In our case study, the union decided to adopt a closed Facebook group, meaning that each member had to send a request to the administrators first to become part of the group. The filtering procedure aimed to create a group for the exclusive use of union members.

The general motivation of the union’s national leaders and communication department for creating a Facebook group was to “modernize” the functioning of the union. They also had three more specific reasons. First, they wanted to adopt a faster and more modern medium than their traditional paper-

based communications for providing information to their members. Second, they thought the Facebook group would open a new space for members to discuss matters together. Creating an internal Facebook group for union members was third seen as an effective way to prevent the spontaneous creation of Facebook groups by those opposed to the union and over which the union would have no control. At the time, Facebook therefore appeared to be the most convenient technological solution as it was extremely popular and free of charge.

Union leaders decided to hire a community manager to moderate the Facebook group. His role was to regularly provide information to the group, answer members' questions and prevent online misbehaviour. They agreed that the moderation should be as loose as possible so as not to contradict the democratic ethos of their organization or the spirit of social media. This philosophy was summarized by one regional executive as follows: *"the idea is not to exert censorship. There will always be "pros" and "cons". The union's ethos is based on this. You are for or against. If you're against, it's ok. Members have the right to say if they are for or against. (RE-b1)"*.

The communication department designed a "netiquette" to set the courtesy rules of the online group. This netiquette would also serve as guidelines for the community manager to moderate the group. However, apart from hiring a community manager and producing a netiquette, the union executives did not attempt to adapt their existing organization to this new technology. The Facebook group was only conceived to be an additional communication channel and not as a way to deeply alter the existing democratic functioning of the union.

Overall, as the case concerns a democratically governed but centralized and bureaucratic union which opened a Facebook group to modernize its democratic functioning, we consider it particularly suited to investigate how participation on social media may interact with existing democratic processes.

### **3.2. Data collection**

Our main contact in the union was the chief of staff who provided us with a greatly facilitated access to actors and data. Three types of primary data were collected. First, in order to capture the evolution of actors' interpretations and actions, we conducted 35 face-to-face interviews at two different points in time (November 2015 and September 2016), which respectively corresponds to middle and the end of the negotiation process. We conducted interviews with national and regional union leaders (n=13), union staff members (n=12) and active Facebook participants (n=10), including three people who were openly against the union (see Table 1) in order to gather interpretations from the different layers of the organization and from different perspectives. The 35 interviews, lasting an average of 75 minutes,

were recorded and transcribed. Interviews have mainly focused on the evolution of the Facebook group in parallel to union activities, on the interviewees' use of the Facebook group and on the interpretation of changes induced by Facebook.

Second, we conducted 15 meetings with the chief of staff and the Facebook group community manager about every month which lasted on average about one hour. These follow-up meetings were used to understand the context of the union's democratic process, and union leaders' actions and interpretations - as both the chief of the staff and community manager were working closely with union leaders.

**Table 1 - interviewees panel**

Position	Interviews	Monthly meetings	Total
National leaders (NE-a to NE-f)	8		11
Regional executive (RE-a to RE-f)	5		5
Local executive (LE-a to LE-g)	7		7
Member (ME-a to ME-c)	3		3
Staff member (ST-a to ST-g)	12	15	33
<b>Total</b>	<b>35</b>	<b>15</b>	<b>50</b>

Third, we downloaded all the messages posted on the group and the associated comments and "likes". This material was composed of 3,633 messages which generated 28,538 comments and 56,286 "likes", representing 1.4 million words – the equivalent of 2,800 pages of 500 words. Within this set of data, we distinguished messages posted by union leaders and by online participants in the following way. We consider messages to be sent by union leaders when they were posted either from union leaders Facebook accounts (n=20) or from union staff ones (n=306 - including 267 from the community manager). We consider all the remaining messages (n=3,380) as messages posted by online participants. Thus collected, our empirical material then enables us to analyse how the interpretation and action of both online participants and unions leaders have been evolving throughout the two-year period of the democratic process.

### **3.3. Data analysis**

We developed a data analysis strategy that was aiming to capture how the interaction between online participation and existing democratic processes has been socially constructed. In order to do so, we focused on how union leaders and online participants' interpretations have been evolving and guiding their respective actions and reactions. The development of our analytical strategy has been iterative going back and forth between emerging concepts and data.

**Stage 1: distinguishing the different phases.** Applying a temporal bracketing logic (Langley, 1999), we have been identifying the different phases of the democratic decision-making process thanks to our interviews and monthly meetings. We evidenced five distinct phases which correspond to the evolution of the negotiation with the government. Each phase is marked by a significant shift in the union's democratic activities: negotiating, demonstrating, 'waiting', deliberating and implementing (see Figure 1). We then confirmed this specific five-phase sequencing by a quantitative and qualitative analysis of Facebook participation (see Table 3 and 4).

Then, to characterize how both union leaders' and online participants' interpretations and actions evolved along these five different phases, we implemented the following analytical strategy.

**Stage 2: coding union leaders' interpretations and action.** We primarily used interviews and monthly meetings with union leaders and staff to characterize union leaders' interpretations. By coding inductively this material, three categories of interpretation progressively emerged: interpretation of harmony between online and offline processes, interpretation of online participants' legitimacy and interpretation of online participation controllability.

To analyse union leaders' action and reaction, we have been relying on interviews and monthly meetings (see Figure 1) and then triangulated our findings with a quantitative and qualitative analysis of union leaders' activity on Facebook. Union leaders action and reaction on Facebook could mainly take two different forms: communicating and regulating online participation. To characterize first union leaders' action as communication, we focused on their overarching objective for communicating on Facebook. Three categories of objectives emerged from our inductive coding of interviews: informing, influencing and supporting mobilization - see Figure 1. '*Informing*' corresponds to messages that aim to provide members with factual information (Saxton & Waters, 2014), such as information about the factual progress of negotiation rounds or strike organization (dates, processes, etc). '*Influencing*' corresponds to a type of communication that aims to shape members' opinion by developing argumentation and/or presenting advantageous facts. '*Supporting mobilization*' corresponds to communication that either aim to motivate members to participate to mobilization or congratulate members for their mobilization. We then cross-checked the analysis of union leaders' main communication objectives by coding their messages on Facebook along the five phases by using the same three categories. We also approached the intensity of union leaders' communication by quantitatively measuring the frequency of their publications (average number of messages and comments per day) – see table 4.

Regarding second leaders' action as participation regulation, we identified the following forms of regulation on Facebook: regulating by creating rules (for example, creating a netiquette); regulating by discussing (for example by engaging with protesters); regulating by removing messages and finally regulating by banning online participants – see Table 4.

**Stage 3: coding online participants' interpretations and action.** We have been primarily analysing online participants' interpretation by coding their messages posted on the Facebook group. To best capture online participants interpretations, we focused on messages that were most influential on online participants' mind by creating a sample composed of messages heavily liked or commented upon by other members. To elaborate this sample, we evaluated the influence of each message through an engagement indicator which is equal to the amount of "likes" generated by a message plus its amount of comments multiplied by two - as comments are seen as stronger forms of engagement than "likes" (Ferdinand-James & Foogooa, 2015). Engagement is now a commonly used metrics to evaluate the influence of publications on Facebook (Poell et al., 2016). Then, for each phase, we coded the 20% of messages which generated the highest level of engagement. In the end, our sample is composed of 687 messages which generated 60% of the total engagement on the group (see Table 2).

**Table 2 - Messages from online participants, sample representativity**

	Phase 1	Phase 2	Phase 3	Phase 4	Phase 5	Overall
<b>Data set</b>						
Number of messages	959	1291	476	272	382	3380
Average engagement per message	24	35	40	29	14	30
<b>Sample</b>						
Number of messages	191	273	96	54	73	687
Average engagement per message	71	97	122	98	48	88
<b>Sample representativity</b>						
% of sent message	20%	20%	20%	20%	20%	20%
% of engagement generated	59%	59%	62%	68%	65%	60%

Based on this sample, we analysed online participants' interpretation by using the three categories that inductively emerged through our analysis of union leaders interpretation. We first analysed how online participants' perceived the existing processes in the following manner. We approximated this interpretation by coding the messages as favourable, disfavourable or neutral vis-à-vis the union and its actions. We paid particular attention to the tone (for instance use of capital letters, emoticons or punctuation), the type of language, the context and other publications to categorize each message, along with their stance. For instance, the apparently favourable message: *"We move forward, we move forward, we don't step back! That's the slogan of our union!"* (posted on the 12<sup>th</sup> of February) was actually coded disfavourable as it was sent by a participant notoriously against the union. In the same

vein, the apparently neutral message *“the professors have been rejecting the agreement in principle...”* (posted on the 30<sup>th</sup> of January 2016) was coded as disfavourable to the union. We indeed considered that the message contradicted the position defended at the time by union leaders, namely to approve the agreement proposed by the government.

Second, we coded how online participants perceived union leaders. When unions leaders were explicitly mentioned, we coded the adjectives used by online participants. Alternatively, when possible, we used other types of references such as *“we”/ “they”* to get a proxy of members' proximity to and sympathy for their leaders. For instance, messages celebrating the unity of the union by using *“we, the union member”, “our union”, “our gang”* were coded as sympathetic to union leaders. On the other hand, we coded that union leaders were perceived as thrifless in the following post: *“Raise of unions fees... I hope it's a joke (...). Why should I pay to raise union leaders and staff salaries?”* (posted on the 29<sup>th</sup> of April, 2015).

Third, we analysed online participants' perceived ability to influence the union process. We did so by elaborating upon Klandermans and Oegema (1987) who found that people were more willing to participate when they perceived that their participation could influence a decision-making process (see Table 4). To approximate members' perceived ability to influence the process, we then paid particular attention to the evolution of participation volume (number of messages per day), interactivity (number of “likes”, comments and engagements per message) and breadth (monthly numbers of unique members posting messages or commenting).

Finally, we evaluated online participants' actions and reactions by inductively coding the principal objective of the most impactful messages as well as their topic. We identified five different categories of principal objectives for online participants' messages: informing, supporting mobilization, questioning, proposing and sharing opinion. Both *‘informing’* and *‘supporting mobilization’* categories correspond to objectives already defined by unions leaders (see description stage 2). *‘Questioning’* corresponds to messages calling for factual and/or practical answers. *‘Proposing’* correspond to messages that aim to share new ideas to improve the union's functioning or strategy, which call for reactions from union leaders or other online participants. *‘Sharing opinion’* corresponds to messages in which online participants argumentatively express their opinion and/or a subjective interpretation.

To identify online participants actions and reactions, we additionally coded the topic of their most impactful messages by using the five following categories that inductively emerged: negotiation content, collective action, union strategy, employer policy, union organization, other. We coded *‘negotiation content’* messages which were primarily discussing what was being negotiated, mainly:

salary increase, bonus policy, recruitment, etc. We coded '*collective action*' messages which were either publicizing collective action or calling to action. We coded '*union strategy*' messages which were primarily discussing the union bargaining strategy with the employer. We coded '*employer policy*' messages which were primarily discussing the strategic, financial or human resources policy of union members' employer – namely the government. We then coded '*union organization*' messages which were discussing the union organization, either seen as a bureaucracy or a democratic organization.

By analysing these data, we could theorize the structuring of online participation by grasping the evolution of union leaders and online participants' interpretation and their respective actions and reactions (see Figure 1).

#### **4. Results: where the interaction between online and offline democratic processes comes to be interpreted as disharmonious, out of control and illegitimate**

Through our analysis, we suggest that the dynamic of the Facebook group evolved through five phases, each corresponding to a specific stage of the decision-making process. In the following sub-sections, we will detail for these different stages union leaders and online participants interpretations and their respective actions and reactions. We will evidence that during the first two phases of the process, both online participants and union leaders' interpretations were globally positive and both sides acted accordingly.

But from the third and deliberative phase, actors' interpretation on both sides totally flipped as did their action online. We then propose to elaborate upon the monstrification metaphor to make sense of their interpretations of a growingly disharmonious, illegitimate and out-of-control organizational phenomenon. From that period, online participants indeed came to present union leaders as authoritative, inefficient, manipulative and selfish oligarchs. In that sense, their expectation of an ideal member-based democratic organization seemed to be betrayed. On their side, union leaders progressively came to perceive the Facebook group as a monstrous entity populated by trolls, which was disharmoniously parasitizing the offline deliberative process, disgustingly breaking the norms of 'good' democratic participation and globally threatening the democratic order.

From the fourth phase, union leaders started regulating more strictly Facebook participation to keep their digital creature at bay. Consequently, activity on Facebook started decreasing. Only during the fifth phase, when the democratic process came to an end, interpretation and action of both union



leaders and online participation came back to a calm and “normal” situation. Nonetheless, union leaders remained largely affected by this episode. They thus decided to no longer use Facebook during the political period to avoid confronting again the digital democratic beast.

#### **4.1. Phase #1: *Calm beginnings (November 2014 to 3rd of October 2015)***

During the first phase of the process, negotiations were the central focus for the union. The process began in November 2014 with the official start of the negotiations and the simultaneous launch of the Facebook group. During this initial phase, only a dozen actors were actively involved in the negotiations with the employer, mainly union leaders and negotiators. The first six months were relatively calm, as the union leaders wanted to show their goodwill to negotiate. But from spring 2015, the gap between the offers made by the employer and union’s expectations became so obvious that union leaders decided to adopt a progressively tougher bargaining strategy. For example, they encouraged symbolic actions such as going to work dressed in black or in pyjamas to stage the collective discontent. They also triggered a legal process to enable the union to go on strike. At this stage, lay-members were not directly involved in the general process, besides sporadic and symbolic direct actions.

***Online participants’ interpretations and action.*** Reflecting the low level of members implication offline, participation on the Facebook group was relatively limited over that first period (see table 3). On average, just three messages were posted daily by members each of which only generated on average six comments and 12 likes. The number of members involved in the online discussion was equally very limited as on average only 30 of them were posting messages and 145 of them were commenting every month. Among these members, one – Jean-Luc Gagnon (all names in the paper are aliases) – was particularly active and decided on his own initiative to regularly feed the group with news articles. He alone posted about one third of the messages sent by participants during this initial stage (302 messages of 959). We suggest that the relative apathy of online participants during this first stage reflects their perceived limited ability to influence the offline negotiation processes, which were in the hands of union leaders and negotiators.

In that first period, members were primarily using the Facebook group to bring visibility and support to the few symbolic actions undertaken against the employer. To a lesser extent, they also used Facebook to denounce either the poor salary and working conditions in public services or the stubborn and contemptuous attitude of their employer in the negotiation process. In the end, most messages sent by online participants were sympathetic to the labour union and its action (76% of the coded message). As an illustration of this relatively harmonious relationship between union leaders and online participants, most members posting on Facebook were using a unitary ‘we’ to refer to the union

as a whole. Mentions to a necessary solidarity and support for union leaders were also frequent. This positive and unitary state of mind among online participants appears particularly clearly in the following message:

*We should take into proper account the importance of the battle ahead of us. Whether or not we are unionist, we should be united (...) In such period we have to act strategically, and I think that our union leaders are doing so brilliantly. They dedicate their time without counting. During the evenings, the weekends or lunch-time, if need be. (posted on the 16<sup>th</sup> of September 2015)*

**Union leaders' interpretations and action.** On their side, union leaders were also assessing positively the Facebook group dynamic. They first considered Facebook as a way to significantly improve their communication processes toward members. This improvement was far from anecdotal as members had frequently criticized the slowness of the union's paper-based communications during previous negotiation rounds. Providing members with timely and plentiful information was of a strategic importance for union leaders. It was indeed a means to keep their members apprised and to prepare them to become involved in more engaging forms of action if necessary. Through the Facebook account of the community manager, union leaders were then sending news about the ongoing-negotiation process about every two days.

At that time, union leaders not only praised Facebook for improving their existing communication activities. They also considered that participation on Facebook, albeit limited in volume, was a good and objective way to get members' views of the union and the ongoing negotiations. Many of them referred to the Facebook group as a "live poll", with members' messages, comments and likes providing a fair reflection of their opinion and mood. One national leader summed it up as follows: *"instead of having feedback through local or regional union reps, thanks to Facebook we have no filters. Instead, we have much more direct contact. And this enables us to truly take the pulse of our members.* (NE-d1) "

For these reasons, participation on Facebook was assessed positively by union leaders. Among the downsides, union leaders were a bit irritated by the small but continuous flow of criticism (14% of the coded messages). They also pointed out the difficulty to face and react to a 24/7 flow of messages, with some of them requiring very quick if not instantaneous answers. They nonetheless progressively managed to cope with this still small feeling of uncontrollability. They first considered that the Facebook group drawbacks were largely counter-balanced by its advantages. They also gradually came to consider criticism as a necessary evil to which they should get used. For these reasons, their

voluntarily loose mode of regulation was still perceived to be sufficient. Only a few messages considered to be too disrespectful has been removed. The union's staff and executives were also satisfied with the self-regulation spontaneously operated by the members. As one national executive noted *"People self-regulate. At one point, a woman wrote on Facebook: 'Miss Gagnon (our interviewee) needs to get some balls'. And somebody answered: 'You obviously don't know her!'"* (Laughing). *In the end, I didn't even have to answer. (NE-a1)"*

Overall, the general interpretation of both union leaders and online participants of the on-going democratic process proved to be positive. Even if at this stage interpretations on both sides were far from being that of facing a dangerous monster, some preliminary signs made of irritation and frustration could be detected. On the union leaders' side, online participation was seen as slightly challenging as it enabled unusual forms of members' participation. The permanent flow of message gave them the taste of hard-to-regulate process, with critique being more present and generally more 'pushy' than usual. On the members' side, even if quantitatively marginal, some took the advantage of the very large freedom of speech and access easiness to voice their concern about the union and its democratic processes. The limited but constant flow of critique was indeed regularly pointing out the labour union deficiencies, thus portraying the organization as old-fashion, inefficient practices and limitedly democratic.

#### **4.2. Phase 2: Euphoria (3rd of October 2015 to 15th of December 2015)**

The second phase of the union democratic process started in the fall of 2015 when the union decided to finally engage in strike action to have more weight at the negotiation table. This ten-week period was marked by five non-consecutive days of demonstration and picketing. This second phase then marks a key turning point regarding members' participation in the general process. Members role was so far very marginal as negotiations were in the hands of a limited number of high-profile union leaders. But as union activities moved onto the streets through this second phase, members at all levels became actively involved in the process. Every single member was indeed meant to participate in street picketing. Being based on broad and direct action, this second phase was characterized by a certain degree of collective euphoria, as described by one staff member: *"The energy and the union dynamic were positive. For us, as a union, going on strike is a sort of apotheosis. (ST-a2)"*.

**Online participants' interpretations and action.** Mirroring the union's momentum, participation on Facebook took off during this second phase (see table 3). Participation peaked in particular on days of action and briefly thereafter, with members publishing pictures and videos of the picket lines, which in turn generated enthusiastic comments and numerous "likes". The breadth of online participation

clearly widened, with the number of unique members posting messages every month being multiplied by 5 (from 30 to 152) and the number of commentators by 4 (from 145 to 591). The boom of online participation during this second phase could then indicate that members felt they had a much greater purchase on the on-going democratic process. By moving to the street and by involving all the members, the negotiation was then also becoming their negotiation.

As such, the tonality of participation on Facebook evidenced a strong feeling of unity and solidarity. Among the many messages celebrating the strength of a union acting as one, the following one nicely epitomizes online participants' state of mind during this second phase:

*I sincerely want to congratulate the people who came from so many different and remote places to demonstrate in Montreal today. Together, we are going to make it, we have many ways to fight against the government (...) and together we are capable of defeating Coiteux (The Minister of Finance), Posted on the 5th of October, 2015.*

Aside from the very large proportion of messages publicizing and celebrating the union's collective action, members also made extensive use of Facebook to share their negative opinions about the government's attitudes and/or to support the union. According to our estimates, an overwhelming proportion of messages during this second phase were favourable (75%) towards the union and its strategy.

**Union leaders' interpretations and action.** On their side, union leaders were also still appraising online participation positively. They first kept on considering Facebook as an improvement of their more traditional communication processes. They were using Facebook even more intensively as before, as their publication pace double during that period (from 0,5 to 1 message per day). Facebook proved to be of a great help during this second phase. Not only did they use social media to push information about the negotiation table, but they also used it to communicate about the strike organization and to congratulate members for their active implication.

In the second stage, the merit of Facebook moved beyond that of improving the existing democratic process. Social media indeed helped to build upon and complement this process. Active and interactive participation in the Facebook group was first seen as a sounding board for "offline" actions which could extend and amplify the union's demonstrations on the streets. Participation on social media was also praised for enhancing a feeling of community and togetherness among a geographically dispersed membership, as summarized by one national leader: *"It helped members to get closer to the union. A strong feeling of belonging. When I go into a meeting, I might see someone and say "that picture of*

you in your pyjamas in the office was really good”. *And then someone else might come up to me and say: “Hey Miss, I know you’ve seen my pole-dancing (while demonstrating), as you ‘liked’ it on Facebook!”*. *And this brings people closer together.* (NE-a1)

As Facebook participation was mirroring the union’s momentum and also because it was making members’ criticism visible, the union leaders continued to see it as an objective and “live” reflection of members’ opinion. With all the positive buzz around demonstrations, their perceived need to regulate online participation was therefore even lower than during the initial phase. A staff member explained this in the following terms: *“There was some criticism here and there on Facebook, but our executives were so busy in the field that attention to criticism was... I would say close to zero”* (ST-a2). Then, as was the case during the first phase, regulation of the group was limited to occasional removal of messages.

Overall, the monstrous side of social media did not clearly appear yet through the second stage of the process. Due to the general level of euphoria, it was on the contrary the beauty of the digital beast which was most salient for both online participants and union leaders. Even if not fully frictionless, the assemblage of digitally-enabled participation with existing offline processes was to a great extent perceived as both harmonious and powerful. As a cyborg whose human capacities are leveraged thanks to technological apparatus, the union was seen as acting faster, more efficiently and more relevantly. The impossibility to fully control the technological appendix was still perceived by union leaders as slightly irritating, but its empowering capacities made it clearly tolerable.

#### **4.3. Phase 3: *The monster rising (mid-December 2015 to early February 2016)***

The third phase started in mid-December 2015 when negotiators from the government and the union eventually reached a consensus, culminating in the signing of an agreement in principle by the two sides. However, for an agreement in principle to be validated, Canadian labour law requires that it is approved by a majority of union members. To fulfil this legal requirement, the union had to consult all its members. The third phase of the process therefore took the form of a six-week “waiting period”, between the announcement of the agreement in principle (mid-December 2015) and the effective beginning of consultation with the members (early February 2016). After a euphoric period when all the union members had been actively involved in demonstrations, union leaders were now expecting from members to patiently wait for the deliberation phase to begin. Throughout this “latency” phase, only a dozen staff members and leaders were involved in the logistical arrangements for the consultation.

**Online participants' interpretations and action.** On Facebook, this third period was characterized by a dramatic change in the dynamic of the discussion. One staff member summarized this radical evolution in the following terms: *"After the euphoria, there was a kind of multiplied disenchantment on Facebook. And, as the Christmas holidays started around then...well, people had lots of time (ST-a2)"*.

While the online flow remained dense (about 10 publications per day) and large (about 549 people commenting every month), the nature of exchanges clearly had shifted. From messages publicizing collective actions and generating many supportive reactions, the discussion on Facebook moved on to animated and polarized political debate generating in turn long and often acrimonious discussions. As an indicator of this shift in the participation dynamic, the average number of "likes" generated by each message almost halved (from 22 to 13) while the average number of comments per message more than doubled in the meantime (from 6 to 14). This high density of online participation arguably indicates members' perceived ability to influence the result of the vote by sharing – often very aggressively – their views with their union fellows.

Being now an arena for polarized political debate where the defenders of the agreement in principle were opposing its despisers, the proportion of posts unfavourable to the union boomed, increasing from 11% to 54%, while posts favourable to the union dropped from 75% to 22%. Beyond the general tonality of discussion, another event came to materialize that the vast majority of online participants were opposed to the agreement. Late January, a few days before the opening of the consultation, a member decided to organize a poll on the Facebook group to know whether members would accept or not the agreement. About 200 members participated in it, with 90% stating that they would vote against.

The central critique of the opponents to the agreement in principle concerned the meagre salary increase gained by the union's negotiators, especially when compared to the cost of going on strike. The two following messages are representative of both the form and the content of critiques during this third phase:

*In the end, after reading the document several times, I am telling you this: vote against as what they are offering us it is a big s\*\*\*. (...) We are making no gain. In reality, we only will have a salary increase of 5.25% over 5 years. The remainder is just giving back the money that we have lost by striking (Posted on the 24th of December 2015)*

*COOOOOOOOL my salary will drop by -0.35% in 2019!!! Wonderful! Heyyyyyyyyyyy bastards, we are not dumbasses!!!! VOTE AGAINST, THIS MAKES NO SENSE!!!! (Posted on the 19th of January, 2016)*

The general unity between union members and leaders that prevailed through the first two stages was totally breaking apart. Dissent regularly dismissed the union leaders for being ineffective and for poorly representing members' interests. The frustration expressed by members at that time is well captured by the following message:

*I'm not angry just because I'm getting no pay raise. It's also because I realize that the government thinks I'm making too much money. (...). And because my union validates all this!!!! (Posted on the 19<sup>th</sup> of January 2016)*

The union leaders were additionally dismissed for trying to influence members opinion. As suggested for instance by the following message accompanied by detailed the calculations, online participants were blaming the leaders for presenting the negotiated salary increase in too a favourable way:

*The figures they presented are manipulated!!!! (Posted on the 26th of December, 2016)*

**Union leaders' interpretations and action.** For union leaders, this radical change dramatically affected their interpretation of online participation which flipped from being overall positive to being clearly negative. They first started getting worried about the fact that social media could disrupt their existing and relatively well-organized democratic process. The deliberation phase, through official consultation, had indeed been supposed to start in early February 2016. But the traditional deliberative process was unexpectedly sidelined by Facebook, which had now become the centre of political discussions. From originally being considered as an addition to traditional processes, the unbridled online participation came to be seen as a threat to existing activities. As indicated by the tone of online discussion, the risk of having the agreement rejected was indeed high. It should be noted that for union leaders, the rejection of the agreement had the potential for some longer-term and very serious individual consequences. It would indeed be a powerful repudiation of their work, which could consequently challenge their position as leaders in the union general elections taking place four months later, in April 2016.

During this tense deliberative period, union leaders growingly started perceiving online participation as unbearable. As a staff member explained to us (SC2): *"Previously, there already were people making hard critiques, but it was manageable. The union structure could stand it. But during the critical phase, it no longer was."* Union leaders came to consider online participation as increasingly disgusting as it

was breaking the norms of acceptable democratic participation: *“Not only did the quantity of critique made online participation hard to bear... But attacks were becoming tougher toward union leaders and staff, or toward people favourable to the agreement. Attacks became really harsh, and sometimes personal. (SC2)”*. Interestingly, it is during this third phase that union leaders came to refer to critical members as *“trolls massively invading”* social media.

With online participation becoming increasingly threatening and disgusting, the need to more directly control the Facebook group became particularly pressing. Union leaders need to react was also exacerbated because they could no longer set the tone of discussions by pushing information online, as they now had entered a passive “waiting” period. Nonetheless, they were still reluctant to directly control participation by removing messages, as most were not perceived to be an obvious breach of the netiquette. In fact, in most cases they were seen as having *“...one foot in, one foot out. The content was interesting, but the tone was inappropriate, this sort of thing. And Bob (the community manager) reacted in a human way by moderating loosely rather than strictly because of the flow of criticism of his management. (ST-a2)”*.

Then, to stem the enormous flow of criticism, and in contradiction to their initial policy, the communication department decided to directly engage in discussions with protesters from mid-January. The number of comments sent daily by the community manager increased from 4 to 9. The following comment posted by the Facebook community manager shows the type of arguments used by unions leaders to try to calm down and reason online participants:

*In the end, it is the members who will decide whether or not the agreement in principle will be accepted during the consultation. (...). Our institution is truly democratic (posted on the 20th of December 2015)*

But even with this new mode of regulation, moderators felt that they were unable to circumscribe dissent.

In conclusion of this third phase, it appears that union leaders were increasingly perceiving online participation as a monstrous organizational phenomenon. Facebook-enabled participation first came to be seen as monstrous as it was parasitizing the union’s existing functioning: the association of online participation with the existing union process thereby created a heterogenous and disharmonious democratic assemblage. Online participation not only created a dissonance with existing democratic processes, but it was doing so in a disgusting manner. The form taken by critique online was indeed breaking union leaders’ expectations of ‘good’ democratic participation by being abusively



inflammatory and aggressive. As such, through the eyes of union leaders, online participants were hence becoming less and less legitimate actors. This disharmonious and disgusting phenomenon became all the more monstrous for union leaders as they proved unable to control this overwhelming and gigantic flow of critique.

#### **4.4. Phase 4: *Taming the monster (early February 2016 to April 2016)***

The fourth phase of the decision-making process started in early February 2016, with the beginning of the members' consultation. This consisted of a lengthy democratic process (about two months) covering each of the 125 and geographically dispersed union sections. The drawn-out consultation period was caused by implementation of the union's traditional practices. Each of the union's section meetings was required to be conducted by one of the nine national union leaders. Lasting between one and two hours, the local meetings opened with a speech by the union national leader who explained and defended the union's official position – in this case, to vote in favour of the agreement in principle. After the leader's presentation, the floor was opened up to questions and debate. It was only after the debate that members were invited to vote for or against the agreement in principle. This fourth deliberative phase again involved all members of the union, but far from being a horizontal discussion "among peers", it was relatively top-down and controlled by executives. As confessed by union leaders themselves, they were more concerned about convincing members to validate the agreement rather than enabling actual deliberative discussion.

***Union leaders' interpretations and action.*** While the union leaders attitude had been mostly reactive attitude during the three first phases, they started acting much more pro-actively from the beginning of the fourth phase in an attempt to regain control over the gone-wide Facebook group. On the 1<sup>st</sup> of February, union leaders decided to post a message to reorient online participants dissent toward external enemies, which reads as follow:

*While it is done with humour, our union denounces the new Disney movie which stages civil servants as sloths. By doing so, they only strengthen clichés about public services workers, while they are dedicated to serve citizens. What do you think?*

But instead of generating reactions against Disney or public services-bashing as expected, this post engendered on the contrary a huge wave of critiques towards union leaders for trying to create a diversion and for clearly lacking a sense of humour. From that day, unions leaders considered that they had lost the grip over the Facebook group.

As the members' consultation was now beginning, the fear generated by participation on Facebook was then reaching a climax: the threat to have online participation taking over the offline deliberative process was more concrete than ever. For these reasons, unions leaders decided to start a stricter form of regulation in order to prevent social media from polluting the existing deliberative process. A prominent national leader suggested a radical option by calling for the immediate closure of the group arguing that *"anyway, people are currently voting, so all the information they need will be provided during meetings. And I am disgusted by this continuous bitching. Facebook no longer gives any added-value. (...) we should shut it down. (ST-a2)"*. After some hesitation, union leaders and staff eventually decided to keep the Facebook group open. They thought that closing it down would exacerbate the tension and would be interpreted by protesters as another sign of the censorship exerted by an oligarchical organization. They also assumed that this would only direct dissent toward another Facebook group over which the union would have no control. The feeling of union leaders could then be compared to that of facing an immortal Hydra, the mythical beast capable of re-growing every chopped head. As explained by one staff member: *"if we look at it objectively, the main reason why we're keeping the group open is because we have no option, because Facebook is here and because we cannot get around it. (ST-b2)"*.

As closing the Facebook group was not an option, the communication department and the national executives jointly decided to vigorously reinforce regulation of the group. First, they decided to enforce the netiquette more strictly. Messages containing rude words, personal attacks or impugning motives to the union were now systematically removed. This new policy led to the removal of about 100 posts and comments within the space of a few weeks. They also decided to set clear rules for excluding members from the Facebook group. If a member breached the netiquette three times, he or she would be excluded from the group. As a consequence, 29 members were eventually banned from the group during this fourth phase.

Despite the progressive enforcement of the new regulation policy, union leaders' interpretation of disharmony remained palpable. The disharmonious relation between online and offline deliberative processes has been formulated in the following terms by a union staff member: *"Facebook is like an assembly that would have no rules nor time control. And our ability to regulate is too limited. Facebook is probably not adapted for such a large audience"* (monthly meeting, February 2016). Union leaders then discarded online participants legitimacy for being a vocal, radical and very active minority which was taking over the silent majority of the union members. As a leader explained to us: *"At that moment, I have been observing that debates were monopolized by a limited number of individuals who were not representative. (...) And this creates a real democratic issue."* (SC2).

**Online participants' interpretations and action.** With the change in moderation and, as the consultation was progressively coming to an end, the intensity, breadth and interactivity of participation clearly started to decline. When compared to the previous phase, the daily number of posts was halved (from 10 to 5) and the number of comments on posts dropped from 14 to 10. Only 271 members were involved in the discussion each month compared to 549 in the previous period.

If the density of participation quantitatively declined, the intensity of political debates remained as vivid as during the third phase. Discussions were still highly polarized between the pros (51% of the messages coded) and cons (30% of the messages coded) of the agreement in principle. But now that the members' consultation got started, critiques were growingly focusing on the democratic deficiencies of the existing offline deliberative process rather than the content of the agreement in principle. Members were notably pointing out the overarching position given to union leaders during the offline consultation meetings:

*From what I have seen and heard, national and local executives are selling the agreement in principle. Where is impartiality here? You should only be presenting the offer and answer the question. Speeches like 'you should take the agreement in principle' should not be allowed! Thank you. (Posted on the 5th of February 2016)*

Many online participants were contesting the new regulation policy on Facebook, seen as an arbitrary practice to protect union leaders interests. The restricted freedom of speech online was paralleled with members' limited ability to deliberate in offline processes. Therefore, online participants were expressing more general concerns about union democratic malfunctioning, by evidencing a widening gap between the leaders and the union members:

*The conclusion will be that of a loss of trust between lay members and the union leaders! I've never seen this! Union leaders complain about absenteeism in assemblies. The coming years won't be any better! I suggest union leaders to take the necessary steps to re-establish confidence and democracy within our union organization (Posted on the 13<sup>th</sup> of February 2016)*

The decline in online participation arguably derives from both the exclusion of active online participants and the progressive termination of the offline consultation process. But this progressive decline may also well derive from online participants interpretation that their influence over the democratic process was diminishing. The online participants feeling of powerlessness has for instance boldly been expressed (and later removed by the moderator) in the following post:

*“It was obvious that the new collective agreement would be accepted and that the voting process was just a mandatory but fake democratic exercise.” (Posted on the 4<sup>th</sup> of April, 2016)*

As a conclusion of this fourth phase, union leaders felt they had no other option than to try to enforce stricter forms of regulation on a Facebook group becoming more threatening than ever. While union leaders progressively managed to tame their creature, we concur that this fourth phase evidenced a novel form of monstrosity. With online participants constantly publicizing the organization’s inherent drawbacks, weaknesses and paradoxes, it was now the monstrosity of the union and its leaders that was becoming more and more salient. As Mr Hyde reveals Dr Jekyll’s dark side, and as his creature evidences Victor Frankenstein’s own monstrous ambition, we concur that participation on Facebook engendered a monster because it revealed the union’s own monstrosity. The chaotic Facebook group portrayed the union as a bureaucratic Leviathan. In the end, the confrontation with the monstrous Facebook revealed the union’s inner demons.

#### **4.5. Phase #5: Back to normality (April 2016 to August 2016)**

The fifth and last phase of the process started on the 31<sup>st</sup> of March, with the end of the consultation and the disclosure of the results of the vote. In the end, 75% of the voting members validated the agreement in principle with a participation rate of 39%. This final period meant there would be no further large-scale, participatory activity or debate. At that time, the union leaders and staff were primarily focused on the practical implementation of the new collective agreement which had been signed officially on the 16<sup>th</sup> of June 2016. As was the case during the first phase of the process, the main objective of the leaders vis-à-vis the union membership was to inform them, in this case to provide them with the details of the agreement and answer their practical or technical questions.

**Online participants’ interpretations and action.** During this fifth phase, online participation had clearly been diminishing and reached a volume similar to that of the very beginning of the process. The statistics clearly show that the volume, interactivity and breadth of participation on Facebook was as low at this point as it was during the first phase (see Table 3). Online participants were then primarily using Facebook to ask questions about the implementation of the new collective agreement or to share news. A very few messages were expressing their opinion about the union or its leaders.

**Union leaders’ interpretations and action.** Union leaders’ activity was described in the following terms by one staff member: *“I would say that we are back to a similar situation to the very beginning. We are giving information from the top down. We also provide some details and we answer questions. But nothing really happens. (ST-a2)”*

The Facebook group cooling-down altered positively the union leaders' evaluation of online participation. It was again perceived by union leaders to be an improvement on existing activities, by making it easier and cheaper to provide timely communications to members. However, unlike in the first phase, they no longer considered Facebook participation to be a reliable indicator of members' opinions. As one national executive put it, *"we realized during the consultation that Facebook was a bad mirror, as our meetings eventually became quite popular and in most cases were held in a calm atmosphere. I'm not saying that nobody criticized the agreement, but overall people proved to be satisfied with it. (NE-d2)"*. They came to consider that, instead of being an objective reflection, participation on Facebook was creating a distorted image of members' opinion, with a tiny minority of vocal opponents online actually obstructing the silent and union-favourable majority.

Facebook no longer made union executives feel insecure as participation had dropped and the agreement had eventually been largely validated by members. Nonetheless, the digital tempest had left deep marks. One union staff member notably reported that *"our decision makers are still living with irritation... Well, it's not irritation. It's trauma from the period when we collectively had to make decisions about the agreement in principle. (ST-b2)"*.

The union executives questioned the necessity of keeping the Facebook group open after the end of the decision-making process. They eventually decided to retain the group under certain conditions. First, they decided that it should primarily be used to provide top-down information, as members had been praising Facebook's added-value by timely and practically delivering information. They then decided that the group should not be used for political and deliberative purposes and decided that, for future deliberative phases, the interactive use of the Facebook group would be suspended by preventing members to post and comment. This decision has latter been commented upon by a staff member as the will to replicate the union existing democratic approach on the new media. As he put it, *"by the way, our very first organizational reflex on Facebook is to develop and enforce regulation. (...) We invest a lot of energy to protect the pyramidal structure of the union (STg)"*.

As a conclusion of this fifth and ultimate phase, it appears that union leaders were no longer frightened by the digital beast. Nonetheless, this first experiment has been a shock for them. In order to protect their existing democratic from the monstrous online participation, they then decided to enforce specific regulation that should enable to keep the digital threat at a distance.

**Figure 1** – Synthesis of union leaders and online participants perceptions and actions

	<b>Phase 1</b> Calm Beginning	<b>Phase 2</b> Euphoria	<b>Phase 3</b> Monster rising	<b>Phase 4</b> Monster taming	<b>Phase 5</b> Back to normality
<b>Pivotal event</b>	<i>Beginning of the negotiations</i>	<i>Beginning of the demonstrations</i>	<i>Publication of the agreement in principle</i>	<i>Beginning of the member consultation</i>	<i>Publication of the vote results</i>
<b>Union leaders' interpretation of</b>					
<i>Online participation</i>	Harmonious (improves)	Harmonious (Complement and expand)	Disharmonious (threatens to substitute)	Disharmonious (threatens to contradict)	Harmonious (improves)
<i>Online participants' legitimacy</i>	Legitimate and representative	Legitimate and representative	Legitimate and representative	Illegitimate and extremist 'trolls'	Illegitimate and extremist 'trolls'
<i>Their capacity to control online participation</i>	Out of direct control	Out of direct control	Out-of-control	Out-of-control	Relatively under control
<b>Union leaders' action and reaction</b>	- Informing - No regulation ↑ Limited interaction	- Informing - No regulation ↑ Massively supporting and publicizing mobilization	- Informing + persuading - No regulation ↑ Very actively debating	- Informing - Message deletion + member removal ↑ Actively debating	- Informing - Message deletion + member removal ↑ Limited interaction
<b>Online participants' action and reaction</b>	↓	↓	↓	↓	↓
<b>Online participants' interpretation of</b>					
<i>Existing democratic process</i>	Harmonious	Harmonious	Harmonious	Disharmonious (undemocratic)	Harmonious
<i>Union leaders' legitimacy</i>	Legitimate (representative)	Legitimate (representative)	Illegitimate (Inefficient and manipulative)	Illegitimate (Manipulative and oligarchical)	neutral
<i>Their capacity to control existing democratic processes</i>	Low ability to influence	Significant ability to control	Significant ability to control	Out-of-control	Low ability influence

**Table 3** – Indicators of online participants’ actions and reactions

Phases		Phase 1: Calm beginning	Phase 2: Euphoria	Phase 3: Critical phase	Phase 4: Monster taming	Phase 5: Back to normality
How much?	Average number of messages per day	3	17	10	5	3
	Average number of comments per message	6	6	14	10	5
	Average number of “likes” per message	12	22	13	9	5
	Average engagement per message	24	35	40	29	14
How broad?	Average number of members posting messages / month	30	152	115	50	16
	Average number of members commenting / month	145	591	549	271	142
How?	% publications unfavourable to the union (n)	14% (26)	11% (29)	54% (52)	51% (27)	21% (9)
	% publications favourable to the union (n)	76% (143)	75% (202)	22% (21)	30% (16)	45% (32)
	% publications neutral for the union (n)	10% (19)	14% (39)	24% (23)	19% (10)	42% (30)
What about?	Most frequent type of messages	Mobilizing and sharing opinions	Mobilizing and sharing opinions	Sharing opinions	Sharing opinions and asking questions	Asking questions and sharing information
	Most frequent topic of messages	Collective action	Primarily collective action	Agreement content + union functioning	Agreement content + union functioning	Implementation of the agreement

**Table 4** – Indicators of the union leaders’ actions and reactions

Phases		Phase 1: Calm beginning	Phase 2: Euphoria	Phase 3: Critical phase	Phase 4: Monster taming	Phase 5: Back to normality
How much?	Average number of publications per day	0,5	1	0,6	0,3	0,2
	Average number of comments per day	1	4	9	4	1
	% of message sent by union leaders	16%	6%	6%	5%	7%
Modes of regulation	Regulating by “ruling”	Creation of a netiquette	No additional rules	No additional rules	Creation of new and stricter rules	Prohibition of deliberative action
	Regulating by deleting (how and what)	Almost none	Almost none	A few dozen	About 200	Almost none
	Regulation by banning members (“who”)	None	None	None	About 30 banishments	Almost none

## **5. Theorizing findings - Online participation and organizational democratic processes: the construction and banishment of the monster**

We started this paper by asking how members' online participation interacts with existing democratic processes. Our empirical findings evidence a five-stage democratic process (see figure 1) whereby, following a calm beginning, a high-tension situation progressively developed. When the tension reached a climax (beginning of the fourth phase), union leaders came to interpret online participation as sufficiently disharmonious and uncontrollable to warrant seemingly completely undemocratic decisions, such as banning those members considered to be monstrous trolls. Our empirical analysis further demonstrated that the negative interaction between online participation and existing democratic processes can be better understood through three interpretative dimensions: the harmony of the relationship, the controllability of the interaction, and the legitimacy of the other party. We propose to theorize this highly problematic interaction as a monstrification process, which helps explain the apparently undemocratic actions of the union leaders.

The first element of the monstrification process is the perception of disharmony between online and existing offline processes. The two first phases have been understood as a period of relative harmony, with online participation complementing and enriching existing processes. However, in the third phase, their interaction came to be interpreted as problematic, with union leaders beginning to view online participation as a threatening substitution for existing offline processes. Subsequently, in the fourth phase, online members also interpreted union practices as essentially undemocratic. Here we suggest that, for both online participants and union leaders, the introduction of online participation began to disharmoniously conflict with the old ways of engaging with the union.

We consider uncontrollability as the second attribute of the monstrification process. While, in the beginning, neither users nor union representatives were in total control of the democratic process, in the third and fourth phases, both came to feel that they could no longer significantly direct its development. From the point of view of union leaders, the content and exchange dynamics of online participation were seen as offensive and chaotic, in contrast to the existing orderly exchange of ideas offline. Online participants, on the other side, considered union leaders to be actively manipulating the existing democratic process, thereby strongly limiting the control by members of offline deliberation.

The delegitimization of the 'others' constitutes the third facet of the monstrification process. This delegitimization then serves as a strategy to make possible a process of exclusion. Our empirical



findings indeed suggest that the frictions between online and offline processes only became unbearably challenging at the beginning of the fourth phase, when union leaders' attempt to regain control failed and when they considered that they had totally lost hold of the situation. In the meantime, online participants started to interpret the union leaders' behaviour as manipulative and oligarchical, and therefore no longer saw them as legitimate democratic leaders. Being themselves delegitimized and monstrified, union leaders believed themselves to have no other option than to delegitimize and ultimately banish online participants in order to solve an apparently intractable and threatening situation. As such, from the perspective of a social constructivist framework, before banishing the monster, the union needed to construct it based on their collective interpretation of its disharmony, uncontrollability and illegitimacy.

In terms of the features of monstrification as an organizational process, we want to suggest that they comprise three specific elements. First, our analysis shows that the interaction between online participation and traditional democratic practices was not inherently problematic, but followed a gradual process of evolution. Disharmony, uncontrollability and illegitimacy were socially constructed over time through the daily interactions of both sets of actors. Second, we suggest that the organizational process of monstrification can be partitioned into three main stages: the emergence of the monster (phase 3 of the union democratic process), the paroxysmal crisis (beginning of phase 4) and the taming of the monster (phases 4 and 5). Furthermore, this process cannot be understood without taking into account the evolution of the overall context that influenced the level, tone and frequency of member participation, as well as the shifting background of each actor's interpretative process.

We propose that the problematic interaction between online participation and existing processes is best conceptualized as a two-sided and co-constitutive phenomenon, which also develops gradually, rather than a one-sided, union leaders-focused interpretation. We have indeed demonstrated that this problematic coexistence is best characterized as a mutual and self-reinforcing rejection process involving both union leaders and online participants. In this sense, the process that led to the delegitimization of online participants as "trolls" cannot be explained without taking into account the reciprocal process of union leaders' delegitimization as selfish and inefficient oligarchs.

While the banishment of online participants and the active removal of messages may at first be considered totally undemocratic and irrational, our investigation finds that such breaches of the union's democratic principles were considered by the union leaders to be the only viable solution in a situation where disharmony, uncontrollability and illegitimacy of other actors had reached a climax. Following the resolution of this crisis, through the implementation of novel forms of control, actors

decreasingly interpreted the phenomenon as problematic, ultimately considering that the situation had returned to normality during the fifth and final stage of the democratic process.

## 6. Discussion

*“The old world is dying and the new world struggles to be born. Now is the time of monsters.”*

Quotation attributed to Gramsci, notes in prison (1971)

We began our study by asking how members’ social media participation in existing democratic organizations interacts with decision-making processes. To do so, we adopted a social constructivist perspective to depict how actors’ interpretations and actions socially build the online–offline assemblage. More precisely, we investigated how both union leaders and online participants have variously interpreted the interaction between online and offline democratic processes and how both types of actors act and react accordingly. Our longitudinal work sheds some light on the apparently paradoxical coexistence of online democratic chaos (Janssen & Kies, 2005; Halpern & Gibbs, 2013; Wright, 2006; Camaj & Santana, 2015) and the maintenance of the existing democratic order (Hindman, 2008; Chadwick, 2011) that we identified in the literature. Our empirical findings suggest that union leaders and online participants came to interpret the online–offline assemblage as disharmonious, out-of-control and led by illegitimate actors. In other words, the interaction of online participation with existing democratic processes gave birth to a monstrification process, with both union leaders and online participants repudiating the ‘abject others’. While the exclusion of online participants may first appear as a blatant breach of the union’s democratic principles, our empirical investigation reveals that such actions have been interpreted by union leaders as the only possible option to tame the digital beast.

In what follows, we discuss how our theorization of the monstrification process may contribute to both the literature on digital technologies in democratic organizations and the still emergent and mostly theoretical literature about monstrous organizations (Thanem, 2006, 2011; Bloomfield & Vurdubakis, 1999). For the former, our paper examines how the adoption of digital technologies in such an organizational context may generate a monstrification process. For the latter, our paper contributes by identifying three key facets of an organizational monstrification process.

### ***6.1. Contribution to democratic organizations literature***

Our empirical investigation converges with existing literature to demonstrate that digital technologies may constitute a very limited lever for the transformation and renewal of the democratic functioning of existing organizations (Hindman, 2008; Chadwick, 2011; Bennett, Segerberg & Knüpf, 2017). However, our work provides a significantly divergent explanation for this apparent inertia. Thus far, scholars have indeed assumed that digital technologies fail to rejuvenate existing democratic organization models due to online replication of existing top-down and limitedly democratic patterns (Della Porta & Mosca, 2005; Kerr & Waddington, 2013). Our empirical and longitudinal investigation challenges this view by showing that democratic organizations may in fact struggle to replicate their existing democratic functioning online, eventually leading them to keep digital technologies and online participation at a distance. By metaphorically comparing to a monstrification process the interaction between online participation and existing democratic processes, our work aims to capture all the difficulties faced by democratic organizations when it comes to rejuvenation through digital technologies. Notably we emphasize that, far from being a superficial and marginal organizational dysfunction, such an interaction can induce a state of deep emotional discomfort for organizational members, eliciting emotions such as fear, disgust and hate.

We contend that our metaphor of the monstrification process further contributes to existing literature regarding digital technologies in democratic organizations by suggesting that the confrontation between online participants and union leaders may be interpreted as a confrontation between two distinct approaches to democracy. We then follow Cohen (1996), who suggested that the monstrification of opponents may be catalyzed by political and ideological differences. In our case, the monstrification process derives from the noxious, bold and brutal interaction between the union's pre-existing democratic approach and the new digitally-enabled one.

On the one hand, the existing democratic process clearly takes the form of a representative and bureaucratic democracy (Voss, 2010), which values collective cohesion and trust in representatives, and relies on clearly defined and ordered rules. On the other hand, the emerging logic of online direct democracy is much closer to the form of "government by anyone and everyone" promoted by Rancière (2014), which values access to participation by anyone, individual freedom of speech, and fluid, emergent process types. As such, both union leaders and online participants monstrified the 'others' with reference to normative expectations of 'good' democratic functioning and 'good' democratic behaviour (Ingebreetsen, 1998; Bloomfield & Vurdubakis, 1999).

Such a perspective offers an alternative to the dominant techno-determinist approaches. It departs from the techno-optimist stance that considers digital technologies as inherently democratic (e.g.,

Benkler, 2006; Shircky, 2008) and which would interpret our case as the consequence of a backward union maladjusted to the new digital democracy (Ward & Lusoli, 2003). It also stands in contrast to techno-pessimist approaches that see social media as generally detrimental to democracy (Dean, 2015; Fuchs, 2014; Morozov, 2013) and which would in our case blame the inherent characteristics of social media. Unlike these two dominant approaches, we refuse to unilaterally blame either the union's existing democratic logic or its new digitally-supported counterpart, but rather aim to underline their potential high degree of incompatibility.

## ***6.2. Contribution to monstrous organizations literature***

Our empirical investigation first contributes to monstrous organization theory by evidencing the three related types of interpretations which can give birth to a monstrification process. More precisely, we suggest that actors may come to perceive an organizational process as monstrous when they interpret it as disharmonious, uncontrollable and led by illegitimate actors. While these components have each been identified in previous research (Cohen, 2006; Law, 1991; Thanem, 2006, 2011), our work contributes by gathering these thus far dispersed elements into an integrative framework.

The present conceptualization of the monstrification process thus extends existing research by explaining how these different monstrous interpretations relate to one another. Notably, we suggest that the perception of organizational disharmony becomes monstrously problematic when actors prove incapable of regaining control over the process. This combination of disharmony and uncontrollability then leads actors to delegitimize and monstrify opponents. Once monstrified, actors can be permitted to enforce solutions which otherwise would have been considered illegitimate. In our case, we contend that union leaders were able to enforce apparently undemocratic policies, such as excluding members, precisely because these members were monstrified as 'trolls'.

Our second contribution to the monstrous organizations literature is our identification of the different stages of the monster manufacturing process. Thanem (2006, 2011) previously suggested that the creation of monsters in organizations results from a process of monstrification, but did not provide further details regarding this manufacturing process. Through his investigation of the process of classification of immigrant workers, Diedrich (2014) suggested that the final stage of the monstrification process is the elimination of the monster, but does not further theorize the prior stages. Our paper thus fills in this gap by specifying three key stages in the monstrification process: the emergence of the monster, the paroxysmal crisis and the monster taming. The monster emergence phase, we contend, may involve some preliminary signs of monstrification, such as perceptions of disharmony or uncontrollability, but these are not yet perceived as totally disharmonious and out-of-control. The second stage corresponds to the paroxysmal crisis where perceptions of disharmony,

uncontrollability and actors' illegitimacy peak. The third and final phase of the monstrification process corresponds, as Diedrich (2014) suggests, to the elimination of monstrous elements. In our case, taming the monster was achieved by excluding those members considered to be trolls. We suggest that this third phase is not an easy or smooth process. On the contrary, this organizational purification process (Bloomfield & Vurdubakis, 1999; Thanem, 2006) is all the more monstrous as it may involve violating core organizational principle – such as, in our case, the democratic principle of (unconditional) members' inclusion.

Our third contribution to the monstrous organizations literature is our theorization of the dialectical nature of such a process. While the literature already concurs that monstrification is a socially constructed process (Law, 1991; Thanem, 2011), this process has thus far been presented as one-sided. Whether in the case of diversity management (Thanem, 2006) or migrant workers (Diedrich, 2014), the process of monstrification is consistently presented as unidirectional, and the role of the monstrified actor is little addressed. We conclude from our empirical research that the monstrification process is better understood as a dialectic and bidirectional process. Indeed, we suggest that the monstrification of online participants as trolls cannot fully be understood without taking into account the reciprocal process through which online participants equally monstrify union leaders as selfish and inefficient oligarchs.

## **7. Conclusion**

The metaphor of the monster may finally be helpful in speculation on the future of online participation in existing democratic organizations. The image of the monster naturally leads one to think that this traumatic failure is likely to prevent or at least inhibit any further digital experiments. As the literature on innovation has already evidenced, the perception of their first experiments leaves a deep imprint on organizations and largely conditions their future collective choices (Sydow, Schreyögg & Koch, 2009).

One might therefore expect that the monster would continue to haunt the organization's collective memory for a long time to come. The organizational narrative of the monster would then indicate, as in Shelley's *Frankenstein* novel (Latour, 2011), that technology represents a danger. In line with this interpretation, the organization would then do its best to protect itself from the monstrous effects of online participation by killing – or at least keeping at a distance – any project involving digitally-based participation.

However, more counterintuitively, the crisis incarnated by the monster may also be interpreted as the preliminary stage of a deep and long-term evolution. Sass and Crosbie (2013) suggest that crises are neither detrimental to democracy nor impediments change. Periods of crisis instead serve to interrogate democratic institutions which in turn helps to rejuvenate and improve their functioning.

An evolutionary reading of the monster may lead us to similar conclusions. Darwin suggested that animals commonly considered as monsters were actually species adapting to their changing environment (Thanem, 2011). Their apparently abnormal form was only a transitory stage toward the creation of a new species. By transposing this interpretation, the monstrous effects of online participation may be understood as merely a first – and painful – stage on the way to longer-term transformation of the democratic model. In this way, though perhaps now reduced to a frightening, disgusting and threatening entity, the monster may come to be seen a “hopeful” creature (Du Gay, 1994).

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# Chapter Two

‘All-singing, all-dancing’: Flashmob unionism as a renewed form of action-oriented unionism

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# **‘All-singing, all-dancing’: Flashmob unionism as a renewed form of action-oriented unionism**

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## ***Abstract***

Industrial-relations scholars have long demonstrated how social movements help rejuvenate unions’ mobilization modes. We contend nonetheless that the field still lacks a comprehensive theorization of the mutations in which unions engaged after the wave in the 2010s of mass and digitally connected social movements, such as Occupy Wall Street. We then investigate the Fight for 15 union-led campaign, which explicitly borrows from contemporary social movements. To do so, we develop a mixed-method framework combining interviews with Twitter data. We suggest the emergence of ‘flashmob unionism’, metaphorically referring to the new dance-performance genre. We evidence how flashmob unionism recasts traditional patterns of unions’ collective action regarding their tactics, organization, framing, and modes of expansion.

**Keywords:** connective logic of action; flashmob unionism; unionism renewal

## **Conference presentations**

**BUIRA** - British Universities Industrial Relations Association (July **2016**) in Leeds; **CRIMT** - Centre de Recherche Inter-universitaire sur la Mondialisation et le Travail (May **2015**) in Montréal; **EGOS** - European Group of Organization Studies (July **2016**) in Naples

## **Status**

R&R round 1 in the *British Journal of Industrial Relations*

## 1. Introduction

The decline of unions' propensity to mobilize is commonly attributed to an ever-more-individualist society (Bryson et al., 2011). At these times of supposed disengagement (Putnam 2001), trying to renew unionism through an activist orientation may well appear a losing battle. Nonetheless, this generally admitted and rather pessimistic assumption of disengagement has been contradicted since the early 2010s by the surprising emergence of major social movements – e.g. the Arab Spring, Los Indignados, and Occupy Wall Street (OWS) (Castells 2012). These movements suggest two considerations for the renewal of an action-oriented unionism. By their very existence, they clearly indicate that large-scale mobilizations remain possible. By their original nature, they also suggest that mechanisms of solidarity and collective action are deeply mutating in our digitalized and networked society, as commonly stated by social-movement scholars (Bennett & Segerberg 2012; Castells 2012; Heckscher & McCarthy 2014; Juris 2012).

Some unions have started to draw inspiration from this wave of social movements to renew their action orientation. Recent studies have notably underlined unions' innovative use of social media (Wood 2015), questioning of traditional forms of leadership (Lévesque & Murray 2013), and intertwinement with broader social struggles (Tapia 2013). Nonetheless, despite these initial developments, we suggest that the field of industrial relations remains ill-equipped to comprehensively analyse and discuss the recent mutations embraced by action-oriented unions to stick with the contemporary spirit of activism. **Our paper then questions how to characterize the renewed forms of action-oriented unionism that draws inspiration from contemporary social movements.** To do this, following a tradition of works that borrow from social-movement theories to enrich the field of industrial relations (Gahan & Pekarek 2013; Kelly 1998; Turner & Hurd 2001; Voss & Sherman 2000), we elaborate on Bennett & Segerberg's (2012) categorization of contemporary social movements. We construct an analytical framework heavily inspired by their work in order to depict the recent evolutions of action-oriented unionism.

We then investigate the US campaign Fight for 15 (FF15), which has broadly been inspired by contemporary social movements, such as OWS and, more recently, Black Lives Matter (BLM). FF15 advocates raising the minimum wage to \$15/hour and has experienced stunning success, with many US cities and states significantly raising their minimum wage. In order to capture the diverse dimensions of this innovative campaign, we designed a mixed-method study that combined interviews with online qualitative and quantitative data harvested from the '#FightFor15' Twitter discussion.

Our study suggests the emergence of a new type of action-oriented unionism, which we call ‘flashmob unionism’ in reference to the new genre of dance performance based on happenings in public spaces (Gore, 2010). As we show through FF15, flashmob as a dance performance and as a type of unionism have striking similarities. Indeed, both rely on surprising, ephemeral, and viral tactics; both are organized using a loose network, and are coordinated hierarchically and behind the scenes; both stage the spontaneous participation of ordinary people; and both aim to remove traditional barriers to participation.

## **2. Occupy unionism?**

A substantial community of industrial-relations academics believes that reconnecting with action-oriented unionism is both desirable and possible (for an overview of the debate, see Fantasia & Voss 2004). We argue that this community developed around two clearly distinct groups regarding the remedy to be adopted.

A first stream of research – which Kelly (1998) calls ‘collectivist’ – assumes that unions should re-ignite an essentially worker-led, workplace-based unionism to reconnect with the original spirit of unionism. Collectivist scholars argue that no sustainable and innovative movement could be built without workers at its heart; they encourage recreation of a ‘social-movement unionism’ putting ‘a new emphasis on rank-and-file participation or mobilization’ (Turner & Hurd 2001: 10). To do this, they expect worker-led unions to remain the central – if not only – organizational vehicle for collective action. This first ‘collectivist’ stance then assumes that all the ingredients necessary for worker-led mobilization are still in place (Kelly 1998; McAlevey & Ostertag 2012; Milkman 2013) as the present neo-liberal context does not substantially differ from the golden age of action-oriented unionism.

Another stream of scholars considers unionism renewal from an ‘evolutionist’ perspective, assuming that the classical ‘collectivist’ solidarity mechanisms have been deeply eroded by the implementation of new managerial practices and increasing blurring of professional identity (Machin & Wood 2005). Evolutionists prompt action-oriented unions to adapt to fundamentally new social and workplace realities in order to be revitalized (Freeman & Rogers 2002; Heckscher & McCarthy 2014); they suggest two interrelated avenues for a renewal of activism-oriented unionism.

First, they suggest engaging in a constant effort to (re)connect with contemporary social movements to frame injustice and make union mobilization work again. As unionism could no longer rely on sole-workplace solidarity, the evolutionist strand recommends actively drawing inspiration from – and bridging with – contemporary social movements which are seen as the laboratory of new solidarity.

Voss & Sherman (2000) for instance demonstrate that unions regaining an activist stance actively import new social-movement strategies. Martinez-Lucio and Walker (2005) equally suggest that an activism-oriented renewal requires serious efforts to update unions' communication culture and organizational identity. Taking a longer-term perspective, Heckscher & McCarthy (2014) suggest that 21st-century unionism should rely on a more fluid, transient and collaborative type of solidarity by imitating new forms of digital and networked social movements, such as Wikipedia.

Second, evolutionists advocate a thorough rethinking of unions' organizational premises. Assuming it became untenable to rebuild unionism as primarily by and for workers, they call for a move towards a network form of organizing in order to bring complementary resources and expertise to unions (Frege, Heery and Turner, 2004). In this line, many scholars have been suggesting that information and communication technology (ICT) could support unions' efforts to build and sustain these networks of contention (Diamond & Freeman 2002; Martinez-Lucio, Walker and Trevorrow, 2009; Muir 2010). Last, in order to infuse unions with this new spirit of activism, evolutionist scholars pragmatically encourage the professionalization of mobilization by hiring dedicated staff (Bronfenbrenner & Hickey 2004). It is to this second evolutionist approach that our paper aims to contribute.

As we have seen, a substantial evolutionist literature has already started drawing theoretical and practical lessons from social movements (including those in the 2010s) to enrich the industrial-relations field. Nonetheless, we suggest that the field still lacks a comprehensive understanding of the rupture implied by these movements, considered by many as the opening of a new era for collective action (Castells 2012; Gerbaudo 2012; Juris 2012). Therefore, we turn next to the social-movement field, which offers burgeoning and highly promising conceptual developments. Notably, we draw upon Bennett & Segerberg (2012) to understand the original nature of contemporary social movements. Their conceptual insights inspire us to construct a frame to understand how action-oriented unions are being renewed by this new type of activism.

### **3. Insights from social-movement studies: contrasting two ideal-types of contemporary social movements**

Bennett & Segerberg (2012) distinguish two ideal-types of contemporary social movements – the collective and connective logics of action. Referring explicitly to Olson (1965), the first and more familiar logic of *collective* action corresponds to social movements that are structured, and led by existing and relatively hierarchical organizations. Second, they define the *connective* logic of action as 'networks that self-organize largely without central or "lead" organizational actors, using technologies

as important organizational agents' (Bennett & Segerberg 2012: 755). The connective logic of social movements explicitly refers to the wave of social movements in the 2010s, which started with the Arab Spring before expanding into Spain with Los Indignados, the US with OWS and (more recently) France with Nuit Debout. Bennett & Segerberg position these connective and collective ideal-types at the two ends of a continuum and clearly acknowledge that most contemporary social movements follow a hybrid model between these two reference points.

In order to analyse how action-oriented unionism is being renewed, we describe a four-dimensional analytical framework that contrasts these two ideal-types of social movement. This framework is heavily inspired by the 'comparative elements' suggested in Bennett & Segerberg's original model (2012: 756), which we have enriched with complementary insights from the social-movement literature (Castells 2012; Gerbaudo 2012; Milan 2015). The four key dimensions of our analytical framework are: the overarching goal, organizational type, framing strategy and mode of expansion of the movement.

### ***3.1. The overarching goal: from mobilizing to gathering***

While connective and collective movements pursue a common objective, the nature of this objective greatly varies. Classical collective movements primarily aim to mobilize around largely predetermined objectives. As collective movements are managed by organizations, their goal is assumed to be already largely embedded in – and bounded by – the pre-existing organizational *raison d'être*. Consequently, traditional collective movements primarily aim to mobilize participants towards a prebounded and relatively clear objective.

In contrast, connective movements have the central goal of gathering people to recreate a feeling of togetherness (Gerbaudo 2012). Many observers find these connective social movements puzzling or even pointless because of the lack of clear, established goals. Castells (2012), however, argues that gathering people is not the means for these connective actions, but an end in itself.

### ***3.2. The organizational type: from hierarchical networks of organizations to self-organized networks of individuals***

As connective and collective actions are oriented towards different ends, they rely on different organizational means. Regarding the traditional collective logic, social movements are structured around formal organizations. These structures are said to remain essential vehicles for enhancing collective movement (Olson 1965). Organizations may coalesce with allies and create networks of organizations, but the network thus created is still expected to be hierarchically coordinated.

At the other end of the continuum, the connective logic relies on a network of self-organized individual participants, where formal organizations are voluntarily marginalized. Infused with an equalitarian ethos, these movements tend to reject centralized authority and hierarchy on principle (Gerbaudo 2012). Nonetheless, some core activists might benefit from a stronger communicative power (Castells 2009), derived from their communication skills and personal networks. Core activists are then expected to be nodal points in the network of participants. However, as these communicative leaders are reluctant to endorse any official role, they remain voluntarily behind the scenes of the movement. In contrast to classical collective action, connective movements are essentially structured and shaped by ICT (Bennett & Segerberg 2012). In classical collective action, people first organize themselves and then communicate accordingly, but 'contemporary activists could well reverse the statement: we communicate in a certain way and we organize ourselves accordingly. It is communication that organizes not organizations that communicate' (Gerbaudo 2012: 139).

### ***3.3. The framing strategy: from collective and exclusive frames to personalized and inclusive ones***

Because of their differences in goals and organizational types, collective and connective movements also show different processes and outcomes regarding how their identities are created. The ability of a social movement to attract participants relies mainly on its capacity to provide an incentivized interpretation of social reality – that is, its ability to frame the issues at play (Benford & Snow 2000). The framing process consists of building the movement's collective identity. According to Bennett & Segerberg (2012), collective and connective movements enforce distinct framing processes and strategies due to their substantial organizational differences.

In the classical collective logic, frames primarily derive from existing organizational values and ideology. As the involvement in collective action is driven by identification with a group, classical collective movements tend to promote more exclusive action frames (Bennett & Segerberg 2012). Generally defined centrally, at the top of the pyramid, their goals and frames are seen as strongly bounded by the existing organizational identity.

In contrast, connective social movements are characterized by the high degree of personalization and inclusiveness of their action frames. Connective-movement frames are exemplified by the central motto of OWS: 'We are the 99%' who enable everybody (but the 1%!) to identify with the cause. Far from relying on a top-down organizational routine, these frames emerge from online participatory processes (Castells 2012). As Milan (2015: 895) puts it, 'with individuals contributing to symbolic production in the first person, movement organizations have lost their regulator role in defining membership and narratives.'



### 3.4. The modes of extension: from coalition-building to viral spread through individual networks

The distinction between ‘collective’ member-based and ‘connective’ peer-to-peer approaches is ultimately reflected by the modes of expansion characterizing these two types of social movements. From the traditional collective-logic perspective, coalition-building is a central strategy to expand the movement. Gathering a large number of participants relies on an active, piloted policy to build relationships with allies’ organizations. Expansion then relies on adding various existing memberships (Bennett & Segerberg 2012).

Meanwhile, the process of expanding connective action is based on links among individual networks, notably through the viral spread of messages. Social-media functions – such as ‘share’, ‘like’, ‘follow’ and ‘retweet’ – define how the network of contention progressively expands.

**Table 1** – Contrasting the connective and the collective logics of action

	Connective logic	Collective logic
Overarching goal	Organizing people without any clear or preset objective – the process is an end in itself	Mobilizing participants in order to reach a clear and often predefined objective
Organizational type	Network of individuals primarily organized online around communicative leaders	Network of organizations primarily coordinated hierarchically
Framing strategy	Communication content centres on emergent, inclusive and personalized frames	Communication content centres on (often pre-existing) exclusive frames
Modes of expansion	Viral expansion through interpersonal networks	Coalition-building strategy in order to accumulate allies’ membership

*Based on Bennett and Segerberg’s (2012) ‘initial comparative elements’*

Equipped with a conceptual framework that contrasts two ideal-types of contemporary social movements along four dimensions (see table 1), we investigate a union-led campaign explicitly inspired by connective social movements to grasp the potentially new type of action-oriented unionism at play. Following Bryson et al.’s (2010: 50) assertion that ‘unfortunately, we do not know what a new model of unionism, which borrows from the success of Facebook-style social networks would look like’, our work aims to provide an empirical and theoretical contribution to fill this significant gap. Through FF15, we discuss **how to characterize the renewed forms of action-oriented unionism that draw inspiration from contemporary social movements.**

## 4. Methodology

### 4.1. Presentation of FF15

FF15 emerged publicly in late 2012, centred on a double objective: raising the minimum wage to \$15/hour (while at \$7.25 at federal level in June 2017) and supporting the right to form a union without retaliation. Two elements of this campaign are of particular interest to our research question.

First, the campaign appears to have a particularly innovative way of mobilizing. The case caught our attention because of the numerous comparisons drawn in the press between FF15 and OWS (see, notably, Johnston in *The Boston Globe* 19 March 2016). Its strong online presence is intriguing: by March 2016, more than 48,000 people were following the campaign on Twitter (through its nine main accounts), and its main Facebook page had been 'liked' more than 277,000 times. For some commentators, it marks such a breakthrough that it has been celebrated as 'the labor movement of the 21st century' (Seidman in *In These Times* 9 March 2015).

Second, FF15 shows stunning ongoing success. The movement is surprising in its development, as it started in the supposedly 'unmobilizable' fast-food sector which primarily employs young people, students, and minority groups (Royle 2004). This industry also has one of the lowest unionization rates, with only 1.4% of its employees belonging to a union – compared to 11.1% on average in the USA (Bureau of Labor Statistics 2015).

The campaign has achieved remarkable mobilization success as thousands of participants joined FF15 demonstrations during the campaign's general action days (Greenhouse & Kasperkevic in *The Guardian* 15 April 2015). But its ultimate success lies in its victories in 2015 and 2016, as the states of New York and California voted to increase the minimum wage progressively towards \$15/hour. In economic terms, these minimum-wage increases could significantly reduce inequality, being likely to redistribute billions of dollars towards millions of low-paid workers in the long term. We consider that this specific and arguably unique combination of innovative means and outstanding results justifies the focus on a single case-study, given the nature of our research question (Yin 1994).

### 4.2. Data gathering

Our research design was mixed-method, but dominantly qualitative – following Morse's (1991) terminology – as our work aims to qualify a new type of action-oriented unionism.

First, we carried out semi-structured interviews to gain a global understanding of the campaign. We then developed the mixed-method approach in order to both complement and develop (Greene et al.

1989) our initial interview-based analysis, designing specific strategies adapted to each dimension of our analytical model (goal, organizational type, framing process, and mode of expansion). This required gathering qualitative and quantitative data such as Twitter data and network relations.

The interviews were mostly held between May and June 2015 in New York and Boston. The 11 interviewees included an online campaign organizer, students and faith-group organizers, 'grasstops' organizers, the director of a worker centre, a political campaign organizer, a sectoral campaign strategist from Service Employees International Union (SEIU), and experts. Each interview lasted 60 to 90 minutes; extensive notes were taken.

In parallel, we collected all Twitter messages marked with the hashtag '#FightFor15' posted between 19 March 2015 and 22 February 2016. Twitter is a microblogging social-network site that permits short messages ('tweets') of 140 or fewer characters to be sent. Our choice of Twitter is justified by its central role in structuring recent major social movements (Buettner & Buettner 2016). Thanks to its 'meta-coding' hashtag function, Twitter enables users to organically annotate their tweet showing to which online discussions they aim to contribute. We focused on this one-year period, because it covers two full mobilization phases, encompassing the two major days of action (15 April and 10 November 2015). Covering a long period also allowed us to get a relatively stable picture of the FF15 online network of participants. Our set of Twitter data – to which we refer as '#FightFor15' – comprises 500,177 tweets posted from 101,579 different Twitter accounts. We used NodeXL software to perform the data collection.

### ***4.3. Data analysis***

We characterized FF15 along the four dimensions of our analytical framework using diverse methods and data (see table 2). First, regarding the overarching objective of the campaign, our inquiry was primarily based on interviews. The orientation of the campaign towards gathering or mobilizing was then triangulated with the quantitative evolution of #FightFor15. Segerberg & Bennett (2011: 202) empirically demonstrate that connective movements show a relatively stable flow of participation on Twitter as they 'operate as relatively long-running epistemic communities, rich with information and analysis'. They evidenced that the discussion of collective movements on Twitter evolves much more erratically, however, with high peaks of participation being followed by long and much less intense periods as Twitter mostly serves in these cases to release 'brief beacons of information and logistics contributing to the orchestration of a particular action within a bounded time frame' (Segerberg & Bennett 2011: 202).

We next analysed the organizational type of FF15 by using complementary interviews and Twitter data. We first identified the formal and hierarchical power relations between actors involved in the campaign thanks to our informants. Interviews enabled us to evidence the nature of actors, labour divide between them, and modes of coordination. We then quantified communicative relations between FF15 actors on Twitter in order to evidence their respective communicative power. Communicative power is commonly approximated (Theocharis et al. 2015) by the number of times an actor's messages are retweeted (i.e. forwarded) combined with the number of times an actor is mentioned (through using '@', which directly addresses a user). We cross-matched the formal and communicative powers relations between FF15 actors. We assumed that if actors' communicative power could be explained through their formal and hierarchical position, the campaign would correspond to the more traditional collective-action ideal-type. Conversely, if it could not be so explained, we assumed the campaign leant towards the connective-logic model.

Third, we approached the campaign framing primarily through interviews. We then refined our analysis through a qualitative discourse analysis of the campaign's key actors on Twitter, which is now widely recognized as a central tool for framing contemporary social movement (Theocharis et al. 2015). To do this, we focused on the discourse produced by the nine FF15 actors with the highest communicative power. In order to focus on the discourse created by these actors only, our analysis concentrated on the tweets originally posted and excluded retweeted messages. Considering the volume of tweets to be analysed (n=9582), we copied the methodological approach developed by Meraz & Papacharissi (2013) to track the framing of the 2011 Egyptian revolution. Notes were taken during the reading of the entire set of tweets, with particular attention paid to language use, tone and rhetoric style.

Finally, FF15 expansion strategy was tracked by combining two qualitative sources of information. We first relied on our informants' outlining of the campaign's expansion activities. Then we scrutinized how the nine key campaign accounts tried to bridge FF15 with other social movements and organizations on Twitter. We paid particular attention to the rhetoric as well as to the type of hashtags used.

**Table 2 – Methodology**

Dimension	Sub-dimension	Type of data collected and analytical strategy	Type and purpose of the mixed-method
<b>Dimension 1: Overarching goal</b>	Strategic agenda of campaign	Interviews	Qualitative data (interviews) complemented by quantitative Twitter data
	Relations between online Twitter discussion and key campaign events	Quantitative evolution of the #FightFor15	
<b>Dimension 2: Organization type</b>	Formal structure of campaign organization	Interviews (types of organizations involved and their respective roles)	Qualitative data (interviews) complemented by quantitative Twitter data
	Communicative structure of campaign online	Communicative power of each participant in the #FightFor15 discussion, measured through number of @mentions and retweets	
<b>Dimension 3: Framing strategy</b>	General framing strategy and process developed by campaign organizers	Interviews	Qualitative data (interviews) developed using qualitative Twitter data
	Content analysis of campaign discursive strategy	Discourse analysis of nine most central FF15 Twitter accounts	
<b>Dimension 4: Modes of expansion</b>	Overall expansion strategy developed by campaign organizers	Interviews	Qualitative data (interviews) developed using qualitative Twitter data
	Content analysis of campaign bridging strategy	Discourse analysis of nine most central FF15 Twitter accounts	

## 5. Results

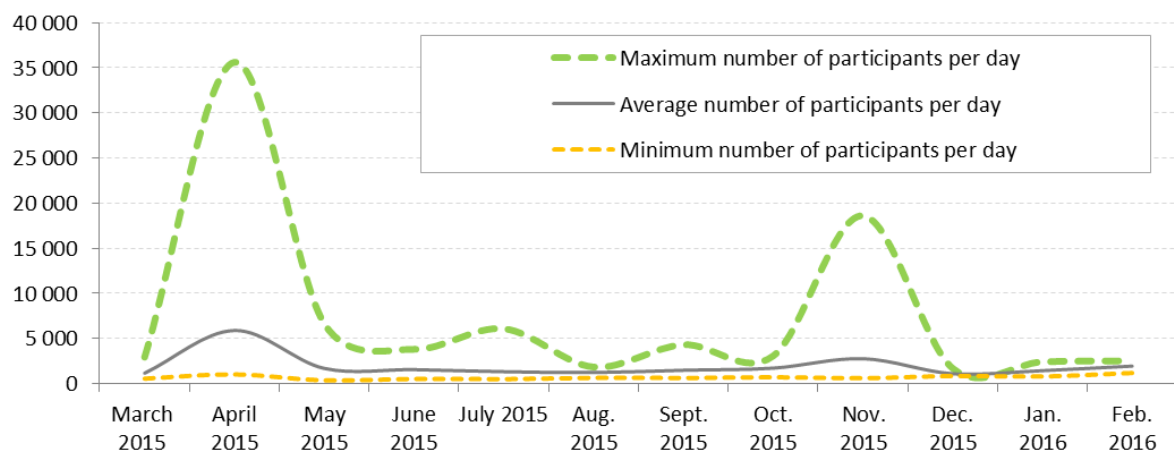
In order to grasp the type of renewed action-oriented unionism that FF15 incarnates, we successively examine the campaign alongside four dimensions: the campaign's overarching objective, its organizational type, its framing strategy, and its modality of expansion.

### **5.1. Objectives of the campaign: mobilizing around flash protests to maximize media and public attention**

FF15 has a two-fold goal, as suggested by its full-length motto: ‘Fight for 15 and a Union’. A strategist from one SEIU sectoral chapter confirmed that FF15 was (at the time of our study) mainly focused on its first objective – i.e. fighting for \$15/hour. The second and long-term objective of the campaign (unionizing the workplaces) was then expected to be more actively pursued in a latter phase. The current orientation towards mobilizing participants to fight for \$15/hour invites qualification of the campaign’s logic as classically collective.

The quantitative evolution of #FightFor15 clearly confirms the more classical collective objective of the campaign towards mobilizing (see Figure 1).

**Figure 1 – Minimum, average and maximum number of daily participants in the Twitter #FightFor15 discussion**



Throughout the period covered by our study, Twitter participation boomed on the campaign’s major rally days, with more than 35,000 participants on 15 April 2015 and more than 18,000 on 10 November 2015. Between these two peaks, Twitter participation significantly dropped. This quantitative evolution, marked by two peaks, clearly suggests that social media primarily supports the campaign’s mobilizing strategy, while a connective movement oriented to ‘gathering’ would have featured a much more stable flow of discussion. An FF15 online organizer confirmed:

Social media is an excellent tool for mobilizing support for action. It seems to bring awareness to protests and give a voice to the workers in a way that traditional media could not do. However, I do not think that social media can replace direct

communication and shop-floor organizing, particularly in low-wage industries.

Instead it is most effective as a tool for publicity.

While still globally embedded in the classical collective logic, the FF15 mobilizing strategy also borrows elements from more recent connective movements. The campaign is conceived as a series of ‘flash strikes’, according to the words of one campaign strategist. Explicitly inspired by OWS (Dencik & Wilkin 2015), flash strikes are oriented towards a direct and open form of action. As an organizer explained, flash actions typically involve a few dozen fast-food workers and labour-movement staffers. Their actions consist of ‘going into target establishments, such as McDonald’s, chanting and holding signs advocating for higher wages for all fast-food workers, speaking with the workers, and giving a speech inside, or in front of, the establishment, and then exiting’.

The general mode of action praised by the campaign – direct, sudden, original, highly impressive and viral – reflects the philosophy of its mobilizing tactics. As opposed to more classical union collective actions, FF15 does not aim to gain power through long-term bureaucratic processes or through more classical forms of industrial disputes. Instead, it stages the development of the movement through episodic and highly symbolic types of direct action that grab the attention of the media and public.

Regarding the first dimension of our analytical model, we conclude that FF15 combines an overall classical collective-logic strategy oriented towards mobilizing with a set of connective-mobilizing tactics best defined as sudden, spontaneous and viral. We next analyse how the organization of the campaign has been designed to support and manage its flash-mobilization strategy.

## ***5.2. Organizational type of FF15: a network of organizations coordinated behind the scenes by the SEIU***

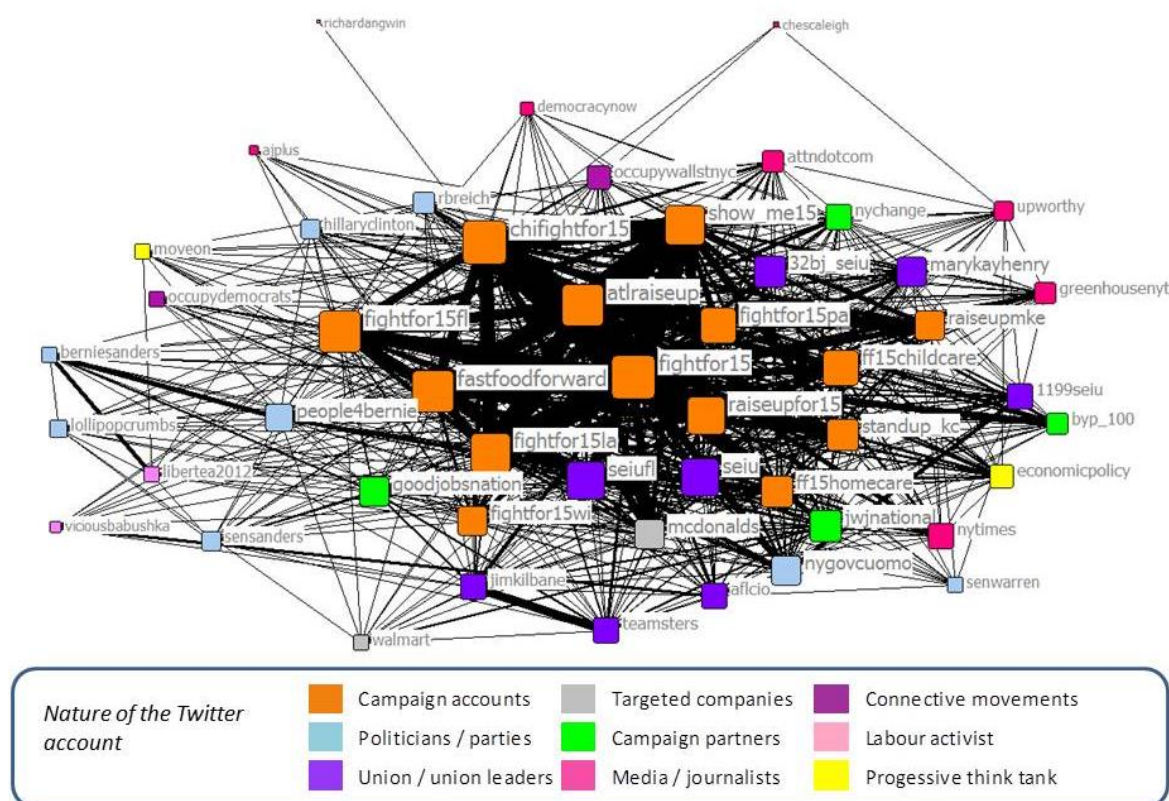
Concerning the organizational structure of the movement, it appears that the SEIU plays a key role in strategizing, financing and coordinating FF15, as confirmed by all our informants and as already evidenced by existing research (see, in particular, Dencik & Wilkin 2015; Milkman 2013; Oswalt 2016). But while the SEIU plays a central role in FF15, the campaign does not rely solely on this organization to perform the work of organizing and mobilizing. On the contrary, the campaign is primarily conceived as a large network of organizations, including worker centres, community, religious and student groups.

While the union centrally coordinates the campaign, local mobilization activities appear to be partnered with – or even ‘outsourced’ to (Dencik & Wilkin 2015) – these allied organizations. For instance, an important part of the ground work has been performed in New York City by the community organization New York Community for Change, and in Boston and St Louis by the worker

centre Jobs with Justice. A worker-centre director explained that these partnerships with organizations from the ‘alt-labour’ movement aim to use ‘their ability to reach workers from the “new proletariat” who have largely remained in the dead angle of traditional unionism’.

Interestingly, while the SEIU plays a central role in strategizing this networked movement, it does not publicly appear as one of the campaign’s front-stage actors. This behind-the-scenes role is what we consider the main organizational specificity of FF15 when compared to previous union campaigns. The SEIU’s behind-the-scenes strategy is supported by the names chosen for both the national campaign and its local chapters: Fast Food Forward in New York, WageAction in Boston, Our DC in Washington DC, and Show Me 15 in the Mid-South states. With its chapters having similar-yet-distinct names, the campaign is staged as a movement that federates various local grassroots initiatives rather than manages them top-down. It thus works as an artefact to camouflage the position of the SEIU as a central actor.

**Figure 2 – Networks of the 50 most central accounts in the Twitter #FightFor15 discussion between March 2015 and February 2016**



The formal and hierarchical structure of the campaign is faithfully reflected in the structure of #FightFor15. First, it is clear that the Twitter network is structured around organizations and not individuals, with 48 of the 50 most central Twitter accounts belonging to an organization or its spokesperson. These Twitter accounts belong primarily to FF15 entities (n=14), unions (n=8), political



parties (n=8) and media organizations (n=7). Regarding the type of actors involved, FF15 thus dramatically differs from the observation made for connective movements. For instance, Meraz & Papacharissi (2013) evidenced – through the Twitter discussion that took place during the uprising in Egypt in 2011 – that the most central actors were primarily individuals (independent journalists, activists or bloggers) and not organizations. Second, far from a being decentralized and self-organized network of individual participants, the online discussion mirrors only the offline-networked but still hierarchical organization of the campaign (see Figure 2). As such, actors with the highest communicative power appear also to benefit from the most central position in the formal structure of the campaign.

Indeed, the national Twitter account (@Fightfor15) features by far the highest communicative power in the online discussion; surrounding this account, many local chapters appear to play a first-order role. Of the 15 most powerful Twitter accounts, nine belong to local or sectoral chapters of the campaign. The backstage role played by the SEIU is also reflected online. The SEIU's official Twitter account is only the eighth most central account in #FightFor15.

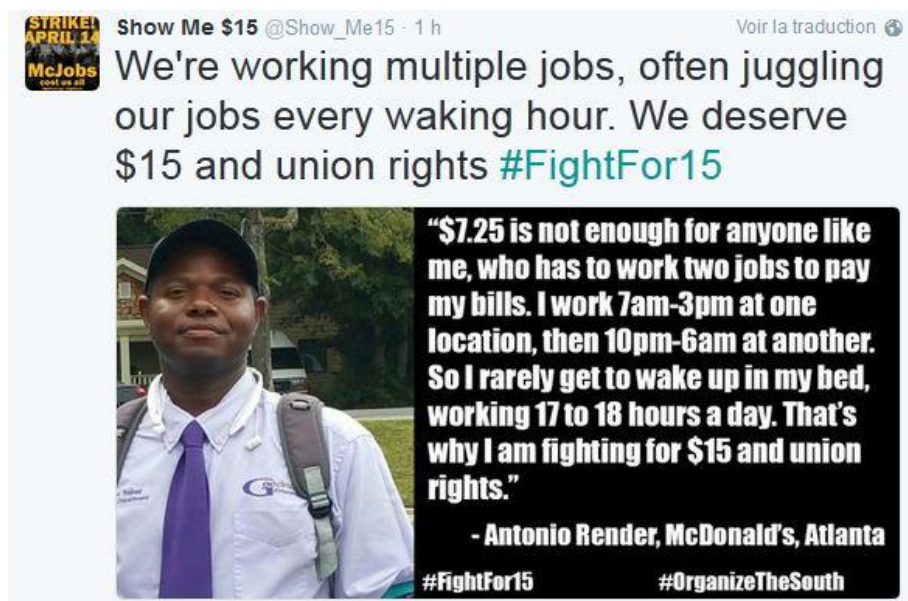
To conclude, the organizational type of FF15 clearly differs from the connective ideal-type as the movement is not self-organized around individuals. We also evidenced that actors with the highest communicative power on Twitter primarily derived it from their formal position in the campaign. Although closer to the collective-logic ideal-type, the campaign cannot be associated with this either, as it is not clearly and centrally managed by an organization but rather is staged behind the scenes by a union. The choice to stay off-stage might initially seem inconsistent with the long-term objective of the campaign – namely to attract new members into unionism in general and into the SEIU in particular. Nonetheless, this specific organizational design in fact aims to support its narrative and the framing strategy of this 'mobilizing stage'.

### ***5.3. Staging a personalized and connective framing***

As suggested by the campaign's organizational design, and as explained by our informants, communication was nationally and centrally coordinated. As a consequence, the general framing process of FF15 clearly adheres to the collective-action logic: far from being performed spontaneously by the crowd, the campaign frames have been designed top-down by strategists. Denouncing this centralization of the framing process, some detractors have nicknamed FF15 'the BerlinRosen campaign', alluding to the role played by BerlinRosen, the communication consultancy hired by the SEIU (McAlevey & Rozworski in *Jacobin* 10 April 2015). Nonetheless, though collective in essence, the communication strategy also – interestingly – borrows and mimics the framing of connective movements.

Qualitative analysis of the FF15 campaign's nine most central Twitter accounts shows that social-media organizers must have fabricated the apparently personal tone of some campaign messages. As an SEIU sectoral campaign strategist explained to us, 'Fast-food workers are not that at ease with communicating. FF15 has to tell the story.' In order to do so, the campaign's main Twitter account often uses quotes from workers, as illustrated in Figure 3 (from @Show\_Me15, a Twitter account belonging to a local chapter).

**Figure 3 – Example of FF15's use of worker quotes**



By promulgating individual workers' own words, campaigners mimic the connective personalized framing process. As this example shows, such tweets enable direct engagement with the audience in the first person (as 'I' or 'we'). Online devices are thus used as a generic spokesperson for fast-food workers. According to an SEIU campaign strategist, this communication strategy has also greatly contributed to the success of the campaign: 'They are really good at creating individual narratives.' The efficiency of this communication strategy is also evidenced by labour expert Harley Shaiken (of the University of California, Berkeley) who explained that 'for many of us, these are workers who we see every day, yet they're invisible. What FF15 has done is give faces, names and personal stories that many, perhaps most, working Americans can identify with' (Kirkham & Masunaga in *Los Angeles Times* 11 November 2015).

In conclusion, regarding the third analytical dimension, we evidence that the framing process mainly sticks to the collective ideal-type logics but its strategy also heavily draws on the connective type of action. The communication strategy is designed to enhance a 'new authenticity' of protests (Dencik & Wilkin 2015) by mimicking the connective framing. Ultimately, this campaign framing should also be

understood in the light of its mode of expansion, which aims to bridge with both collective and connective movements.

#### ***5.4. Mode of expansion: swarming among allies' organizations and beyond***

The campaign's expansion strategy relies on two parallel tactics. The first consists of putting in motion a network of allies' organizations through a spill-over effect. The second aims to bridge online with connective social movements.

*Staging a swarming effect through the multiplication of one-day flash strikes.* We evidenced from our interviews that FF15 first adopts a more traditional collective strategy to expand the movement. As discussed, FF15 is building a network of organizations in order to increase participation to rallies. But the dynamic of this traditional coalition-building approach has been strategized in order to mimic a spill-over effect and then swarm the campaign.

The campaign appeared publicly in late 2012, when a first day of action was organized in New York, with 200 participants. A few months later, in April 2013, a similar movement occurred in Chicago, this time mobilizing around 500 participants (Oswalt 2016). The movement then spread rapidly all over the USA, and was sustained between 2013 and 2015 by seven waves of national action days. This succession of one-day mobilizations enabled a geographical spill-over effect to be created, as the number of local chapters involved in FF15 progressively grew. The expansion of the campaign has not been limited by the US border and developed internationally under the banner #FastFoodGlobal.

In addition to its geographical expansion, the campaign also progressively involved unions from other low-paid service industries – in childcare through FF15 Child Care, in airport services through Poverty Doesn't Fly, and in non-tenured academia through Faculty Forward. An SEIU campaign strategist insisted on the importance of creating a spill-over effect to enhance the movement's success: 'The feeling of something "big" is important, psychologically speaking; it is crucial to build a momentum.' In this respect, the choice of New York City as a starting point for the campaign derived from its potential to start a spill-over effect. As one campaign organizer explained, this city's particular proximity with media makes it easier to attract public attention: 'New York sets the scene.' The campaign, conceived as a succession of geographical and sectoral spill-overs, also has an innovative strategy and tactics for online expansion.

*Bridging FF15 within existing connective movements.* Qualitative analysis of the online campaign revealed a complementary swarming strategy, also directly inspired by the connective logic. While the swarming coalition-building strategy focuses on existing formal organizations, the online campaign heavily targets connective movements in order to bridge with them digitally. Analysis of

the key FF15 Twitter accounts indeed evidenced a relatively heavy use of open-ended and inclusive messages borrowed from existing connective movements.

First, FF15's communication plays with the symbols popularized by OWS. It frequently refers to one central motto – 'we are the 99%' – which denounces the increasing gap between the richest 1% and the remaining 99%. This symbolic reference is, for instance, mobilized by FF15 online campaigners in order to nail the fast-food industry as a contributor to the 1%/99% divide:

In 2014, the 99% saw income growth, but for the richest 1% it was an absolutely killer year #FightFor15 (@atlriseup, 2 July 2015)

Fast Food CEO (who makes \$17,192/day) Blames Low-Wage Workers for Poverty #FightFor15 (@fightfor15, 30 June 2015)

Besides OWS, FF15 also intensively engages with BLM. This movement (dedicated to ending police brutality towards black people) rose to prominence in late 2014. As existing research shows, although BLM does not fully adhere to the connective ideal-type because of its progressive structuration, it remains largely connective in essence, due to its grassroots way of organizing, and the prominence of its online structuring (Freelon, McIlwain & Clark, 2016). FF15 has been actively communicating in order to evidence the inextricable intertwining of the connective BLM struggle for racial justice with its own fight for economic justice, as the following tweet shows:

Reminder that unemployment is below double digits for everyone but Black people #BlackLivesMatter #FightFor15 (@fightfor15, 5 April 2015)

To evidence the connections between the two struggles, FF15 also borrowed some rallying cries from BLM – e.g. 'I can't breathe' (Eric Garner's last words as New York City police officers strangled him in a chokehold):

If you believe #BlackLivesMatter then you know we can't breathe if we can't eat #FightFor15 (@show\_me15, 6 May 2015)

Regarding the effects of the expansion strategy on mobilization, no precise figure at the global level has been communicated. Nonetheless, the estimated breakdown of participation in the New York rally of 15 April 2015 seems to indicate the combined effects of the FF15 expansion strategy. According to a campaign coordinator, around 50% of the 30,000 participants were identified as being members of the campaign's partner organizations; of these, between 500 and 800 would have been fast-food workers. The remaining participants – roughly half of the demonstrators – would thus have joined the rally thanks to a connective swarming effect.

In summary, analysis of FF15 evidences a hybridized expansion strategy that borrows from both collective and connective logics. First, the ‘on-the-ground’ coalition-building strategy clearly relates to the traditional collective logic of action, as this strategy consists of accumulating allies’ membership. Nonetheless, this first and more traditional expansion strategy has been staged through a geographical and sectoral spill-over effect that mimics the spontaneous and burgeoning development of connective movements. In parallel with this strategy focused on membership-based organizations, the online campaign also directly targets connective movements that are strongly structured online, e.g. BLM and OWS. The campaign tries to expand virally towards participants who could not be reached through the traditional coalition-building strategy.

### 5.5. The rise of a flashmob logic of unionism

As suggested by our empirical investigation, FF15 represents a form of action-oriented unionism that hybridizes the collective and connective logics of action (see Table 3). Along the four dimensions scrutinized, we have evidenced that FF15 borrows and mixes elements from both collective and connective logics.

**Table 3 – Hybrid flashmob logic of FF15**

	OWS-like Connective logic	FF15 Flashmob logic	Union-like Collective logic
Overarching goal	Organizing people without any clear or preset objective – the process is an end in itself	Mobilizing around ‘flash actions’ in order to maximize media and public attention	Mobilizing participants in order to reach a clear and often predefined objective
Organizational type	Network of individuals primarily organized online around communicative leaders	Networks of organizations loosely but hierarchically orchestrated behind the scene	Network of organizations primarily coordinated hierarchically
Framing strategy	Communication content centres on emergent, inclusive and personalized frames	Creating connective personalized frames in order to stage the movement as inclusive, spontaneous and grassroots	Communication content centres on (often pre-existing) exclusive frames
Modes of expansion	Viral expansion through interpersonal networks	Co-existence of online viral expansion and a swarmed coalition-building strategy	Coalition-building strategy in order to accumulate allies’ membership

We use the ‘flashmob’ metaphor to characterize this type of unionism, as it shares much with this new dance genre (Gore 2010).

We first suggest that flashmob as a new dance genre and as a type of unionism pursue similar overarching goals and use analogous tactics. As the term ‘mob’ (standing for ‘mobilization’) clearly evidences, a flashmob dance performance aims to mobilize people around a precise and pre-defined objective. It then relies on tactics that create sudden, unexpected, highly visible and relatively impressive effects. As noted by Gore (2010: 130), flashmob ‘has a strong spectacular dimension and explicitly aims to capture public attention’. While the number of direct spectators is generally limited to a few dozen, the online diffusion of the performance truly enables audience leverage, with the most popular flashmobs gathering millions of views online (e.g. the performance in Grand Central Station, New York<sup>2</sup>, having been viewed more than 36 million times). The combination of a clear strategic orientation towards mobilization, combined with tactics that aim to surprise the audience and are amplified through their online diffusion, fully corresponds to the approach developed by FF15.

Second, flashmob unionism strongly resembles the organizational patterns of the dance show. Indeed, the very existence of flashmob dance performances relies on the impulse of a choreographer – the ‘moberator’ – who centrally defines the major parameters of the show but remains entirely behind the scenes. Nonetheless, because flashmobs surprise the audience, they are at first perceived as spontaneous dances performed by a bunch of ordinary people. This mode of organizing strongly echoes FF15, which is performed up-front by grassroots organizations but still coordinated centrally and behind the scenes by the SEIU.

Third, we suggest that the appeal of flashmob unionism relies on similar framing mechanisms as in the new dance genre. Indeed, both stage the spontaneous participation of ordinary people. This greatly contributes to the appeal, as it eases the identification of the audience with participants. FF15’s communication relies on staged personalized frames, which enhances the legitimacy of the campaign by presenting it as grassroots and worker-driven.

Fourth, flashmob allows the classic barrier to participation to be removed. Gore (2010: 126) evidences that participation in a flashmob performance is not bounded by membership or by affiliation to an existing organization, and states that ‘unlike conventional street theatre, anyone may join in’. Participants are gathered virally, as the invitation to take part is shared generally online through

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<sup>2</sup> <https://www.youtube.com/watch?v=jwMj3PJDxuo>

interpersonal networks. As we have seen, this expansion strategy – which targets participants beyond traditional membership-based organizations – also characterizes FF15.

## **6. Discussion**

Our model of flashmob unionism and its related analytical framework contribute to discussions about the renewal of action-oriented unionism in two ways. First, the flashmob-unionism model extends recent work in understanding unions' efforts to draw inspiration from contemporary social movements by providing a comprehensive theoretical model and an in-depth empirical example drawn from a recent successful campaign. Second, our analytical model contributes more specifically to unionism renewal along its various dimensions. We believe that the concept of flashmob unionism brings novel insights regarding the organizational form, framing strategy and expansion mechanism that unions may implement in order to update their mobilization processes.

### ***6.1. The emergence of flashmob unionism***

Gerbaudo (2012) suggests that in contemporary social movements, mobilization can be compared with dance performances, which are choreographed collectively by activists through social media. Building on Geraudo's highly inspirational comparison, we suggest comparing FF15's logic to that of flashmob dance performances. We now contrast this metaphor with other images already suggested in the literature to describe the contemporary evolution of action-oriented unionism.

First, having analysed FF15, Dencik & Wilkin (2015) suggest the rise of an 'outsourced unionism' model. This metaphor indicates a certain isomorphism between the new type of unionism and the franchised model of the fast-food industry. This comparison insightfully depicts the networked nature of the campaign and its centralization around one hub. Nonetheless, we contend that this viewpoint overemphasizes the bureaucratization and standardization of the campaign. Notably, it fails to capture the staged 'grassroots-ness'. Also commenting directly on FF15, Oswald (2016) suggests the emergence of an improvisational unionism. Comparing FF15 with improvised music, Oswald rightly describes it as a movement whose key parameters are decided in advance, and where all participants benefit from a certain freedom to follow their own inspirations. However, we believe that Oswald's comparison falls short in capturing essential components of the campaign, in particular overlooking the swarming and ephemeral tactics that are central to the FF15 strategy.

Next, commenting on the 2011 Wisconsin labour protest, Collins (2012) evidences the rise of a community-based unionism. While also partly applicable to FF15, this comparison fails to grasp both

the central role played by the SEIU in FF15 and the plurality of allies, which goes way beyond community organizations.

While the various metaphors already suggested by the literature (outsourced, improvisational or community-based unionism) capture important aspects of these renewal attempts, we suggest that our model of flashmob unionism might provide a more comprehensive understanding of the recent shift in social movements -inspired unionism.

## ***6.2. Specific contribution to the renewal of action-oriented unionism***

Second, our work aims to make contributions regarding the various mechanisms at play in contemporary union-led mobilization processes. Our framework highlights issues regarding the organizational form of collective action, its framing strategy and its expansion process. We discuss below our specific theoretical and empirical insights into each of these distinct facets of the hybrid collective action.

Regarding the organizational form to be adopted, our paper seeks to add to the discussion around the network form of organizing, in an attempt to go beyond the classical ‘bottom-up’ versus ‘top-down’ divide in industrial relations (Hickey et al. 2010). More precisely, our findings call into question two issues commonly associated with the network form of organizing – namely the role of unions in the network, and the volume of resources needed to enhance a networked collective action. So far, evolutionist scholars have been recommending unions to become network orchestrators (Heckscher & McCarthy 2014; Wood 2015). The orchestrator metaphor suggests that the role of unions should primarily consist of coordinating the bottom-up activities initiated by workers and their allies. As such, the orchestrator would have no direct hierarchical power but would manage mobilization through a flat form of collective leadership. From our study of FF15, we suggest that the role played by the union does not fit with the suggested definition of the orchestrator; instead, it is much closer to that of a moberator (i.e. flashmob choreographer). We argue that unions as moberators still play a hierarchical role in strategically planning the mobilization, in constituting and maintaining the networks of participants, and in bringing resources. As such, our metaphor of the moberator differs from the view that associates the network form of organizing with the absence of power or hierarchical relations (Shirky 2008). When a union acts as a network ‘moberator’, its role does not consist merely of coordinating grassroots energies: it aims to put actors in motion. The moberator image also suggests that the network form of organizing is not necessarily a low-resource model of mobilizing. We suggest that the network form of organizing remains highly demanding of resources (Bronfenbrenner & Hickey 2004). As we have seen, the creation and maintenance of a contention network requires heavy financial resources. We have also seen that online collective actions do not occur through a natural



and autonomous peer-to-peer process; contentious communication (including on social media) also requires a significant investment of time and expertise. We have evidenced that FF15 campaigners felt the need to compensate for the potential deficiency in workers' communicative resources through hiring both communication consultants and social-media (online) organizers.

Next, our paper also brings some insights into the renewal of unions' framing strategies. The emergence of an internet-based communication era has generated numerous calls for unions to fundamentally update their communication strategies (e.g. Panagiotopoulos & Barnett 2014; Ward & Lusoli 2003). We concur with Lévesque & Murray (2013: 778) that the development of a 'more encompassing and inclusive narrative' might reinvigorate unions' legitimacy and appeal, especially in a period when classical institutions and political organizations – including unions – tend to be mistrusted by activists (Gerbaudo 2012). We then suggest that the development of 'flashmob unionism' offers three interrelated avenues for developing more encompassing and inclusive framing strategies. First, FF15 campaigners strongly mimic connective personalized frames in order to put the injustice experienced by workers at the very heart of their communication. Second, individual-level injustices have been wrapped in macro-level injustice rhetorics developed by contemporary connective social movements such as OWS and BLM. Using Benford & Snow's (2000) terminology, this macro-level social injustice rhetoric is then used as master frames that 'provide the same function as movement-specific collective-action frames, but [...] on a larger scale' (Gahan & Pekarek 2013: 761). By relying on existing connective social-movement frames, the union campaign then benefits from an already established and legitimate framing of injustice. The reference to OWS, for instance, enables the injustice experienced by workers to be attributed to the 1% who rule the world economy. Third, in order to support the direct connection established between micro-individual and macro-society levels of injustice, the meso-level role played by the SEIU is voluntarily kept unseen. This voluntary step-back by the unions might then contribute to strengthening the legitimacy of the campaign, which then does not appear to be led only for the sake of the unions' existence. In summary, we argue that in an age of connective actions, unions could renew their framing strategy by using personalized frames to evidence micro-level workers' injustice, by embedding these individual narratives within macro-level connective frames that ultimately dispense with using more exclusive meso-level unions' collective frames.

Finally, we suggest that the mobilization potential of unions increasingly relies upon their communicative power. A union's power is classically approximated by its membership or density (Hickey et al. 2010; Kelly 1998). Our study of FF15 suggests another facet of power upon which unions can increasingly rely in a period of communicative capitalism (Dean 2009): communicative power (Castells 2009). This move towards a more symbolic and communicative battlefield seems to leverage

mobilization processes in two ways. First, it directly targets key assets of ‘communicative’ companies, namely their brands (including employer’s brand). While online campaigning might have a very limited direct impact on industrial processes when compared to industrial disputes such as strikes or go-slows, we argue that it nonetheless offers significant bargaining power as it targets corporations’ immaterial assets. Second, we contend that the communicative form of contention eases mobilization by lowering the cost of participation. As we have seen, flashmob primarily aims to raise unions’ communicative power through an impressive and viral type of action. We argue that this type of action – which gets around many legal constraints when compared with strikes, for instance – is less costly in terms of time and risks for participants, and especially for workers. It also offers opportunities to bridge with contemporary social movements that are heavily structured online. While membership, density and demonstration size remain key indicators of union power, we suggest that this power also increasingly depends on its capacity to attract media attention, and the sympathy of both public opinion and social-movement activists. In this understanding, media noise – and the number of Facebook likes, Twitter followers and YouTube views – also become key indicators of unions’ communicative bargaining power, as they both evidence the potential of unionism to swarm their action and harm communicative corporations.

## **7. Conclusion: limitations and future avenues for research**

As we have seen, the model of flashmob unionism far from recasts all the mechanisms of union-led mobilization. Nonetheless, we hope that the few variations it suggests might provide some insights relevant to the potential emergence of a renewed action-oriented unionism. In particular, we have shown that connective social movements represent a substantial source of inspiration for unions if they are to stick to ‘the new spirit of activism’. In this respect, we consider that this work paves the way for two promising research questions.

First, our work has evidenced only one of the multiple possibilities regarding unions’ hybridization between collective and connective logics. The investigation of other hybridized union-led movements would surely evidence the emergence of alternative logics of action, as already partly suggested by Wood (2015). To that extent, our analytical framework – heavily inspired by Bennett & Segerberg (2012) – might well serve as a tool to initiate a taxonomic approach to union hybridization.

The second avenue for research concerns the management of tensions that inherently derive from hybridization processes. Indeed, while hybridization has been proved to leverage social-movement performances by enlarging their audience and participation, and by enriching their repertoires of

action (Heaney & Rojas 2014), it also raises numerous and risky challenges. Hybrid movement creates tension in terms of leadership, organizational design and or legitimacy. Last but not least, another tension created by connective–collective hybridization concerns the sustainability of this new type of movement and the volume of resources it requires. As already suggested, the ephemeral nature of connective movements might seriously jeopardize the sustainability of union action. The precise analysis of these many challenges would no doubt offer promising insights to enhance unions’ renewal efforts, and to continue supporting their invention of tomorrow’s labour movement.

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# Chapter Three

From 'organizing' to 'networking': how the US labour movement is renewing its strategy to reach precarious workers. The cases of the 'Fight for 15' and 'Our Walmart'.

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# From 'organizing' to 'networking': how the US labour movement is renewing its strategy to reach precarious workers. The cases of the 'Fight for 15' and 'Our Walmart'.

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## ***Abstract***

For about 20 years, labor organizations in the USA have been trying to 'organize' workers in previously unorganized industries and companies. Referred to as 'organizing', this strategy appears to have had some success in the public and industrial sectors but has found it more challenging to scale up and sustainably organize workers from the fast-growing, low-paid, precarious services industries. Our article examines two recent, large-scale 'organizing' movements ('Fight for 15' and 'Our Walmart'), which emerged in the USA in two 'unorganizable' sectors: the fast-food and supermarket retail sectors. Our findings suggest that these campaigns have achieved some significant victories, which we attribute in both cases to a shift from an 'organizing' to a 'networking' paradigm. We argue that these approaches represent two novel forms of organizing, which we term as 'intersectional solidarity bridging' and 'professional solidarity bonding'. We discuss the ruptures and continuations implied by these developments in terms of discursive and organizational strategy.

**Keywords:** solidarity, unionism renewal, organizing, networking

## **Conference presentations**

International Sociological Association (July 2017) in Lisbon; Association Internationale de Management Stratégie (June 2018) in Montpellier; Society for Advanced Socio-Economics (June 2018) in Kyoto

## **Award**

Early career workshop award – SASE (June 2018) in Kyoto

## 1. Introduction

With more than 30 years of declining union membership in most developed countries, the ability of the labor movement to build solidarity among workers has arguably been weakened. To stop this decline, from the mid-1990s, US labor organizations began to dedicate increasing resources to organizing workers from industries that had long been deserted by the unions (Bronfenbrenner et al., 1998; Heery et al., 2000). Referred to as ‘organizing’, this strategy is broadly defined as an attempt to ‘reach the hard-to-reach workers’ (Martinez-Lucio, Marino and Connolly, 2017).

Beyond this broad definition, the literature suggests that successful ‘organizing’ requires two distinct but interrelated activities (Lévesque and Murray, 2005; Blyton and Jenkins, 2013). First, ‘internal organizing’ consists in creating a workplace dynamic to involve workers in mobilization. Second, ‘external organizing’ consists in increasing bargaining power by gaining support from allies outside the workplace, including from pro-labor organizations, public opinion, politicians and the media. The ability of a labor movement to scale up and succeed will therefore depend on its capacity to combine both ‘internal’ and ‘external’ organizing (Milkman, 2006; Blyton and Jenkins, 2013). The literature reports 20 years of significant labor ‘organizing’ victories in the public (Saundry and Wibberly, 2013) and manufacturing sectors (Lévesque and Murray, 2005) where this recipe for success has been applied.

Nonetheless, in the low-paid and precarious service industries, the literature repeatedly evidences the difficulty of scaling up and sustaining such a dynamic beyond episodic or geographically limited campaigns (Martinez-Lucio, Marino and Connolly, 2017; Simms, 2012). In those industries where the precariat flourishes (Standing, 2016), it has been argued that the ‘organizing’ strategy should be abandoned altogether (de Turberville, 2004) as the structural barriers to ‘internal’ and ‘external’ mobilization – workforce fragmentation, high employee turnover, low professional identification and harsh managerial practices – are too high. However, others advocate that large-scale mobilization in precarious and low-paid industries remains possible if labor organizations can create novel forms of labor solidarities adapted to their specific constraints (Hyman, 1999; Simms, 2012). Our paper therefore asks how ‘labor-organizing’ initiatives can succeed in scaling up in precarious, low-wage industries and labor-intensive industries.

To do so, we investigate the cases of ‘Our Walmart’ (OWM) and ‘Fight for 15’ (FF15). These two US ‘organizing’ initiatives emerged in the retail and fast-food sectors, respectively – two low-paid service industries strongly associated with the rise of the precariat, ‘low road employment’ practices (Hocquelet, 2014; Royle, 2010) and a long and sophisticated track record of union busting

(Lichtenstein, 2009; Royle, 2002; 2010). The two initiatives share further commonalities: they have been backed by traditional labor unions; they have been praised for their innovative stance; they have found a way to scale up and reach a large audience; and, finally, both have achieved some significant, though different kinds of, successes for workers. On the one hand, OWM, which has focused on one single employer –the world’s biggest private employer – and has managed to win pay increases and other concessions from the employer thanks to a strategy based on ‘internal’ organizing. The US FF15 campaign, on the other hand, is an ‘external’ organizing strategy, which began by targeting a number of large fast-food employers (many of which are franchise operations) and then expanded to cover a wide range of other low-paid service workers. FF15 is more of a social movement and political campaign that has won small concessions from some employers, but also significant minimum wage rises across a number of cities and states. It became part of the agenda of the 2016 US Presidential race.

Based on 54 interviews and an analysis of online organizational discourse, this paper contributes to the debate about ‘organizing’ strategies in low-paid industries by questioning their current premises. We suggest that these two organizing initiatives have managed to scale up not because they have successfully combined ‘internal’ and ‘external’ organizing activities, but because they have shifted from an ‘organizing’ to a ‘networking’ paradigm. Despite their marked organizational and discursive differences, they both share two characteristics. First, they show a clear move toward a network organizational form which implies increasingly blurring hierarchy, processes and boundaries. Second, they created a discourse which has enabled the coordination of ‘the multitude’ rather than imposing a unified and fixed collective identity. We use the term ‘professional *solidarity bonding*’ to describe the model developed by OWM and define it as a crowd-sourced network focused on workplace-based solidarity. In the FF15 case, we use the term ‘intersectional *solidarity bridging*’, which we define as a ‘grasstop’ network based on intersectional and citizen solidarity.

## **2. Key success factors and limitations of the ‘organizing’ model**

US union membership and overall influence have been crumbling over the last 30 years (Milkman, 2006) and, for about 20 years, the US labor movement has been looking for ways to stem this downward trend (Hurd, 2004). ‘Organizing’ has been the main means to try to reverse this decline. It has generically been defined as ‘...*reaching out to harder-to-reach workers and workplaces*’ (Martinez-Lucio, Marino & Connolly, 2017: 35). ‘Organizing’ was presented in the mid-1990s as the path to salvation for organized labor. It was seen as the way to get rid of the business unionism model described as pyramidal, bureaucratic or ‘wishy-washy’ and considered by many as part of the cause of

the decline of unionism (Fantasia and Voss, 2004). Based on a greater orientation toward activism, the 'organizing' model was seen as a means to succeed where more traditional labor approaches had failed.

Scholars quite commonly recommend combining two distinct but interrelated activities for 'organizing initiatives' to successfully grow and sustain (Lévesque and Murray, 2005; Milkman, 2006; Blyton and Jenkins, 2013). They first suggest an 'internal organizing' strategy, best understood as '*...mechanisms developed in the workplace to ensure democracy and collective cohesion among workers*' (Lévesque and Murray, 2005: 493). This focuses primarily on involving workers in collective action and is considered by Blyton and Jenkins (2013: 736) to be '*the bedrock for mobilization*'. As well as involving workers in 'organizing initiatives', others argue that these initiatives need to develop connections with external allies to leverage the power of workers. Lévesque and Murray (2005) define external organizing as '*work(ing) with their communities and build(ing) horizontal and vertical coordination with other unions as well as alliances among unions, community groups and social movements*' (p493).

'External organizing' then relates to activities commonly defined in the literature as 'coalition building' (Frege, Heery and Turner, 2004). The development of 'community unionism' (Martinez-Lucio and Perrett, 2009) also corresponds to this form of 'external organizing', as it tries to compensate for low or non-existent levels of worker solidarity by coalescing with stronger community organizations (Tapia, 2013). In order to evidence the complementarity between internal and external organizing strategies, Milkman (2006) suggests drawing comparisons between labor-organizing and military strategies. For her, 'internal' organizing is the equivalent of 'on-the-ground' operations, while external organizing is compared to 'air bombing'. Therefore, winning an 'organizing war' will require complementary action on both battle fronts.

However, although the combined use of 'internal' and 'external' organizing strategies has enabled labor organizations to gain significant victories in the industrial (Lévesque and Murray, 2005) and public sectors (Saundry and Wibberley, 2013), achievements in the low-paid and precarious service sectors appear to be much more limited. With the exception of a few episodic and/or local victories (Engeman, 2015), hopes of seeing organized labor expand on a significant scale in low-paid and precarious service sectors have not yet materialized.

Authors in the US (Hurd, 2004; Nissen, 2004) and the UK (Simms and Holgate, 2010) suggest that up to now 'organizing' attempts have not been transformative enough to adapt to low-paid and precarious industries. These authors argue for a combined evolution of both the organizational structure and the discursive strategy of 'organizing' initiatives. This two-sided prescription echoes the

viewpoint of Hyman (1994: 14) for whom unionism renewal *'...is in part a question of organisational capacity, but more fundamentally it is part of a battle of ideas'*.

More precisely, the literature suggests that the organizational structure of most 'organizing' initiatives remains embedded, by and large, in bureaucratic and hierarchical structures (Nissen, 2004; Hurd, 2004). For this reason, Martinez-Lucio, Marino and Connolly (2017: 38) recommend the creation of new modes of organizing in precarious industries based on *'new forms of joint action and dialogue'*. The literature also highlights the need for a renewed rhetorical and discursive strategy. Simms (2012) forcefully argues that organizing models have not yet been able to create a new encompassing rhetoric that would unite workers beyond their diverse employment situations and heterogeneous work experiences. Voss (2010), commenting on the US, develops a similar argument and encourages the development of a renewed organizing discourse that would better echo the concerns of today's workers. Nonetheless, these broad and relatively vague prescriptions to adapt the 'organizing' model tell us little about the paths that should be followed to grow sustainably. We now turn to the cases of 'Fight for 15' and 'Our Walmart', which may provide significant insights into how organized labor initiatives can scale up in precarious service industries.

### **3. 'Fight for 15' and 'Our Walmart'**

For several reasons, workers targeted by FF15 and OWM typically correspond to the 'hard-to-reach workers'. At the national level, the USA remains at the forefront of neo-liberalism (Milkman, 2013), with a hostile legal and political environment for labor. In the USA, these two services industries are characterized by low-skilled jobs, low wages, high labor turnover, poor conditions of work and anti-union managerial practices (Lichtenstein, 2009; 2013; Royle, 2010; Hocquelet, 2016). The majority of the workers in these sectors are often discriminated against in the labor market, as they mostly comprise young and old workers, women, people from the black and latino communities and other ethnic minorities, economic migrants and single parents (Royle, 2010). Because of the multiple barriers to collective action listed above, organized labor only has a very limited presence in these sectors, as exemplified by their very low unionization rates – less than 0.5 percent in 2012 for the US fast-food and 5.3 percent for US retail sectors, respectively, whereas the national average for the whole US private sector is 6 percent and 12.5 percent for all sectors (retrieved from Bureau of Labor Statistics on October 30, 2017: <https://www.bls.gov/>).

### ***3.1. The striking similarities: innovation, scale-up and outcome***

Despite these challenges, the two organizing initiatives have managed to innovate, scale up and make some significant gains. The innovative approach associated with these campaigns has been noted elsewhere (Oswalt, 2016; Tapia, Lee and Filipovitch, 2017; Wood; 2015), and they are often cited as examples of a resurgence in the US labor movement (Curry, 2015; Smiley, 2015). They have also demonstrated strong abilities to scale up and reach out to a large audience, as epitomized by their very significant online presence when compared to traditional union campaigns. The FF15 Facebook page has gathered more than 342,000 ‘likes’ and the OWM about 52,000. By comparison, the Facebook pages of the Service Employees International Union (SEIU) and the United Food and Commercial Workers Union (UFCW) – the two labor unions involved in the initiatives, with 1.9 and 1.3 million members, respectively – only had 80,000 and 65,000 followers, respectively.

Beyond their significant size and online presence, both movements have managed to gain major victories, albeit of different kinds. The SEIU estimates that by 2017 around 22 million workers had had some sort of pay rise as a direct result of the FF15 campaign, and the National Employment Law Project (NELP) has estimated that these rises will be worth some \$61.5 billion in additional pay by 2020 (NELP, 2016). While the federal minimum wage remains at just \$7.25 per hour, a number of cities and subsequently US states (beginning with Seattle in 2014) began to phase in a \$15 per hour minimum wage by 2020. In July 2015, McDonald’s stated it would pay an additional \$1 per hour to the 10 percent of its employees in its company-operated stores. However, the 90 percent employed in its franchises were not included. OWM succeeded in putting enough pressure on Walmart for the corporation to raise the minimum wage for all its US employees from \$8 to \$10 per hour and more recently to \$11 per hour. The campaign also pushed Walmart into agreeing to give employees a full week’s notice of work schedules (although whether this will work in practice at the local level remains to be seen).

As well as looking at the movements’ commonalities, their focus on raising minimum wages and some of their joint actions and mutual support, it is also interesting to examine their distinct renewal philosophies and trajectories.

### ***3.2. Key differences between the FF15 and OWM movements***

The two movements have very distinct philosophies, with the FF15 putting a strong emphasis on ‘external’ organizing and the OWM on ‘internal’ organizing. This is emphasized by their self-descriptions on Facebook. OWM for example declares that:

*‘This page is for us, the Associates of Walmart (Associates being the name given to Walmart employees by Samuel Walton, Walmart’s founder). It is designed to be a*

*forum for Associates to connect and share. Through this page we hope you will: share ideas to create solutions to collective problems we have at Walmart; engage each other in a respectful, fun and meaningful way; become a part of our community of Associates that supports each other.'*

This suggests the adoption of an internal perspective by stating, for instance, that '*...this page is for us, the Associates*'. The page suggests that workers' participation is key to the renewal process. Aligned with this approach, the creation of a workers' community is not only a means toward an end, it is arguably an end in itself.

Given its focus on several employers, the FF15 Facebook page has quite a different emphasis, focused around 'external organizing':

*'Workers have come together to fight for fair wages and the right to form a union without retaliation. (...) When workers are paid a living wage, not only will it strengthen the economy but it will also reduce crime in our neighborhoods.'*

The use of the term 'workers' instead of 'we' suggests that union organizers clearly differentiate themselves from workers. The FF15 statement is predominantly addressed to communities and allies rather than workers, as it stresses the interweaving of the FF15 movement as a social movement concerned with broader social and economic issues.

#### **4. Research method**

Our data aimed to capture the organizational structures and rhetorical strategies of both FF15 and OWM. To grasp these two facets, our research project is based on two types of data which have been collected and analyzed in two steps (see table 1).

Between June 2015 and May 2017, we carried out 54 interviews – 42 for FF15 and 12 for OWM (see table 2). We also had the opportunity to attend various events related to FF15, notably three national action days (in November 2015, April 2016 and May 2016) and the first FF15 national convention (August 2016). We also attended OWM events, notably an action day in November 2015 and two conference calls.

This was complemented by an analysis of the FF15 and OWM discursive strategies. We harvested Facebook statuses posted on the two movements' main pages between October 2015 and May 2017, which is the longest period for which both accounts have been active. Our Facebook dataset contains

796 messages from OWM and 3,982 from FF15. We used Facebook as a source of discourse analysis for two reasons. Facebook is by far the most popular social network in the US with 68 percent of Americans using it (Greenwood, Perrin and Duggan, 2016). It is also widely recognized as a key medium for organizations to frame their discourse and is commonly used to study organizational rhetoric (Barros, 2014; Harlow, 2012).

**Table 1 – Details of data collection**

		Data collected
<b>Phase 1:</b> Interviews	FF15	42 interviews in New York, Boston, Miami, Tampa and New Orleans between June 2015 and July 2017, including with two senior SEIU officials leading the campaign, a campaign strategist, worker-center director, 4 FF15 organizers, 13 leaders, 3 student organizers, 4 worker-center activists, 4 labor experts and 11 fast-food workers involved in the movement
	OWM	12 interviews between November 2015 and April 2016, including with the campaign director, a national organizer, 2 local organizers and 4 employees/leaders
<b>Phase 2:</b> Facebook status analysis	FF15	Double coding of 300 out of the 3,982 Facebook statuses posted between October 2015 and July 2017
	OWM	Double coding of 300 out of the 796 Facebook statuses posted between October 2015 and July 2017

Our overall analytical strategy is mainly inductive. With regards to organizational structure, we reviewed our interview notes and transcripts by paying particular attention to the roles of organizers, the relations between workers and organizers and the types of partnership with allied organizations and social movements.

For the analysis of the discursive strategy, we coded 300 Facebook statuses for each case. To do so, we randomly selected 14 statuses per month over the 21-month period covered by our analysis. We then coded the messages by putting an emphasis on the various rhetorical elements that frame collective action according to Kelly (1998), namely the type of injustice evidenced, the definition of the collective identity (who are ‘we’) and the attribution of injustice (who are ‘them’).



## 5. FF15: the emergence of an intersectional solidarity bridging model

The movement now known as ‘Fight for 15’ first publicly appeared in November 2012 with a strike involving 200 fast-food workers in New York. Since then, its central claim has been to raise the hourly minimum wage to \$15 and to gain the right to form a union, its main motto being ‘Fight for 15 and a union’. The campaign is relatively hierarchical, being centrally led by the SEIU – a major service industry-focused labor union. In terms of both its discursive strategy and organizational structure, FF15 has arguably relied heavily on allies and external resources to leverage collective action.

### **5.1. FF15 organizational form: a ‘grasstop’ form of networking**

Our interviewees referred to FF15 as a network or a movement rather than as a traditional ‘organizing’ campaign. We suggest the term ‘grasstop networking’ as the best way to describe the form taken by FF15, as this best captures its organizational structure. The movement operates through a network orchestrated centrally and from the top down by the SEIU in an effort to bring together a vast, evolving and heterogeneous bundle of grassroots organizations, networks and social movements.

Although the FF15 movement presents itself as a purely bottom-up and worker-led movement, the SEIU has played a central role in initiating, directing and funding the campaign from the beginning. As one New York city FF15 organizer stated:

*‘People generally think that the movement is very grassroots. But at the end of the day, it is not (...). My perspective is that it’s very top-down. Decisions come from the big union.’*

The SEIU’s role in the campaign dates back to 2011 as part of a multi-year plan to create a ‘*new movement against social and economic inequality*’ (Moberg, 2012; Franco, 2017) in which SEIU leaders had already envisioned a movement aimed at ‘*creating a “surge” of popular and progressive action that will provide a fertile context for organizing more workers into unions*’ (Moberg, 2012). The SEIU has led a centralized top-down movement particularly in its communication strategy, its mode of operation and key events planning. An online organizer exemplified how communication was centrally coordinated through weekly conference calls with communications coordinators and directors. The organizer stressed that these meetings were ‘*focused on making sure they were all “on message” when it came to upcoming events*’.

The SEIU has funded the employment of hundreds of organizers of the campaign, which has meant a huge commitment in terms of resources. While no official figures have been provided, one estimate suggests that the SEIU invested about \$80 million between 2012 and 2016 (Williams, 2016).

Despite the central role of the SEIU in strategizing and piloting FF15, the movement clearly departs from a more traditional top-down and bureaucratic way of organizing. As famously defined by Weber (1978), a bureaucratic function involves a stable organization with clearly formalized roles and processes. Contrary to this, FF15 operates as an evolving network through which ground-work is flexibly ‘improvised’ by its allies (Oswalt, 2016). Apart from the SEIU, the FF15 network is primarily composed of front-groups, such as labor and community organizations to which organizing work is ‘out-sourced’ (Milkman, 2013). The logic for this approach derives firstly, from the greater proximity of community groups to the hard-to-reach, precarious low-paid workers. Secondly, in view of the extremely well organized and hostile anti-union US employment relations system, the SEIU has preferred to remain a backstage actor in order to present the movement as purely bottom-up and worker-led. While the major strategic lines have been centrally defined, organizers from ‘front-organizations’ nevertheless have had substantial leeway in developing their own daily tactics, as one Miami FF15 leader stated:

*‘We set up this action during a weekly meeting. Each one of us brought her or his idea. What does it have to look like? Which stores to aim at? Which kind of action? Who will talk? Who will be in charge of the security? Who will meet and discuss with the police before the action?’*

In addition to its tactical flexibility, the FF15 network is also characterized by the elasticity of its boundaries. Geographically, the movement expanded rapidly. Having started in New York in 2012, the campaign went ‘international’ in 2014 under the banner ‘fast food global’, with the SEIU and unions in other countries coordinating international days of action targeting McDonald’s (as the world’s largest and best known fast-food company). By 2016, the US campaign had spread to 340 cities involving many thousands of workers and activists. FF15 local chapters in the US were composed of specific constellations of worker centers, community organizations, labor, faith or students’ groups. Rather than bureaucratic ‘organizing’, we suggest that the FF15 operates as a grasstop network through which the SEIU cultivates and bridges various grassroots initiatives in an effort to create a consistent movement.

We argue that the FF15 grasstop networking form also implies different relationships with allies than those in more bureaucratic coalition-building strategies. While the latter may entail more punctual and ephemeral joint actions, this network way of organizing suggests long-term mutual support between allied organizations. Thus, this longer-term solidarity approach materializes through allied organizations asking their members to regularly invest money and time beyond their direct interests. The logic of this longer-term and mutualistic network is, for instance, evidenced by a Miami organizer:

*'If you're here for them, they will be there for you. It is the organizing circle.'*

Aligned with its original grasstop network structure, interviewees suggested that social media has supported the FF15 movement in three main ways. First, it helps to amplify offline action by echoing on-the-ground messages from fast-food workers. Second, the use of flat and distributed communication technologies has helped to frame the movement as being horizontal and grassroots. Third, social media has helped raise awareness of the movement and may potentially lead online sympathizers to take offline action. In summary, FF15 has used social media mainly as a one-way communication device aimed at informing participants and sympathizers.

We now turn to discursive analysis of the FF15 to depict how its rhetorical strategy has supported this original organizational structure.

### ***5.2. FF15 discursive strategy: an intersectional discourse to bridge the struggles***

The FF15 discourse is built on broad social and economic forms of injustice. Although also present, work-related issues appear to be quite marginal. FF15 primarily mobilizes citizen- and community-based forms of solidarity. This discursive orientation consistently supports the 'external organizing' orientation of FF15. The citizenship- and community-based discourse enables allies and sympathizers to engage in the movement and to lever workers' power. It also clearly aligns with FF15's initial ambition of '*changing the national conversation*' about income inequality – a key priority for the SEIU President Mary Kay Henry (Moberg, 2012).

As such, FF15 frequently focuses on and communicates messages around the ever-increasing economic inequalities in the US over the last thirty years. The movement's discourse heavily draws on Piketty's work (2013) and the Occupy Wall Street rhetoric, both of which have evidenced the growing discrepancies between the richest 1 percent and the remaining 99 percent and between the salaries of CEOs and ordinary workers, as well as the associated decline in trade union density and influence. They also put a considerable emphasis on sizing the low-paid workers phenomenon, by showing for instance that 64 million workers make less than \$15 per hour, the movement's defined threshold for a living wage. FF15's communications also aim to foster this citizenship-based solidarity by suggesting the incompatibility between democracy and inequality. They also play on citizen sensitivity by pointing out that while the low-paid employees of large corporations are forced to rely on food stamps, big business avoids contributing to the national effort through their tax evasion schemes.

While clearly focused on national economic inequalities, the FF15 discourse also combines this citizenship-oriented solidarity with more community-based links. To this extent, FF15 frequently evidences how their fight for economic justice is inextricably linked with other struggles for racial,

gender or migrant justice. This intersectional approach is, for instance, more explicitly stated in the following Facebook message:

*‘There is a natural intersection between what’s happening with Black Lives Matter and the #FightFor15.’* (FF15 Facebook page, October 23, 2015)

The intersectional approach (Davis, 2016) – i.e. intersectionality of the struggles – developed by FF15 suggests that these distinct struggles should actually be understood as one. The FF15 not only evidences how inequalities are growing in the US, it also shows that racial and ethnic minority populations and women are over-represented among low-paid workers (see Figure 1 - posted on October 1, 2015).

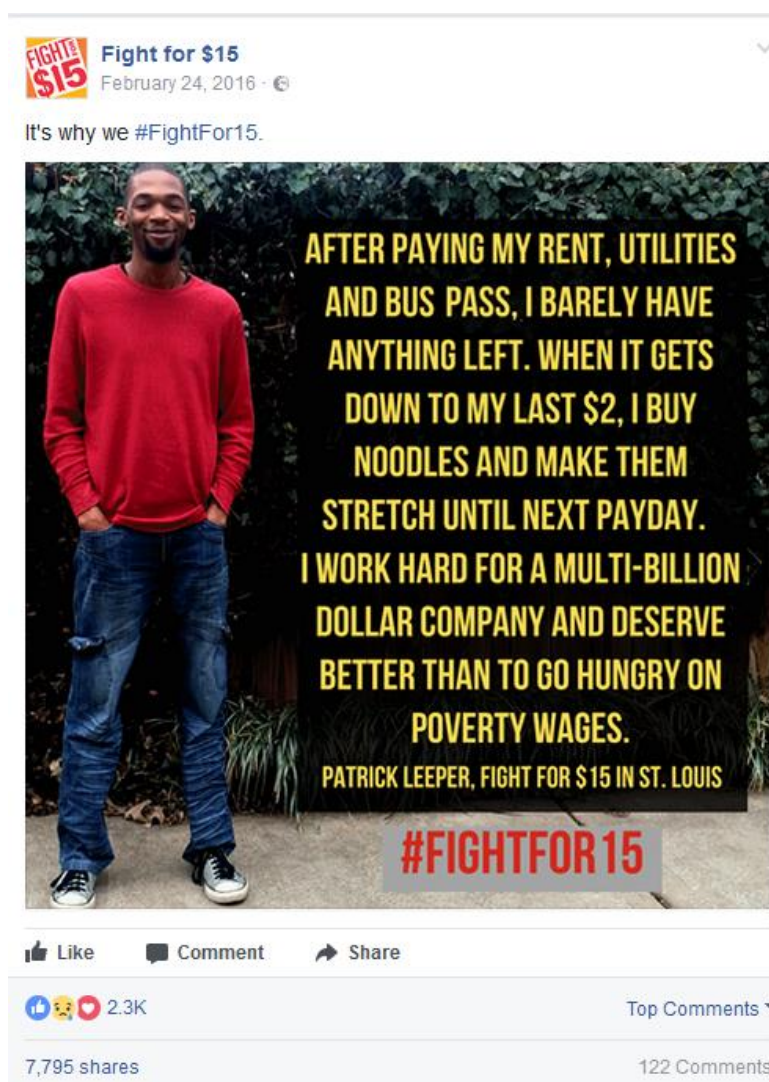
**Figure 1 – Example of FF15’s intersectional discourse**



To support the citizen- and community-based forms of solidarity, FF15 can be understood as having a dual-level collective identity. ‘We’ refers to both low-paid workers and/or more globally to FF15 sympathizers.

The first-level and narrower collective identity of FF15 corresponds to fast-food and other low-paid workers. Interestingly, the low-paid workers highlighted in FF15 communications predominantly belong to visible minorities, with many being women. This first facet of FF15's collective identity often materializes online through personal testimonies or quotes, with pictures of the workers as a background. The message citing Patrick (see Figure 2 – posted on February 24, 2016) typically epitomizes how the FF15 low-wage worker identity is depicted:

**Figure 2 – Example of FF15's staging of personal testimony**



We suggest that this intersectional low-paid workers' identity supports the FF15 solidarity-catalyzing strategy in three ways. Clearly presenting these 'new faces' first helps low-paid workers to identify themselves with FF15. This communicative turn clearly suggests that these discriminated populations are no longer overlooked by labor organizations, while unions have for long been accused of being gender- and color-blind (Thomas-Breitfeld et al., 2015). Second, we suggest that these messages help foster the empathy of FF15 sympathizers with low-paid workers. The 'compelling stories' of low-paid

workers help put flesh on the bones of the FF15 struggle in addition to the 'cold' statistics and figures that they also disseminate. Third, by presenting 'iconic' low-paid workers who may suffer from multiple forms of discrimination (for instance a single-parent woman from a visible minority), FF15 gives a concrete face to its discursive intersectional strategy.

The second facet of the FF15 collective identity relates more broadly to the movement's sympathizers. This broader collective identity encompasses the large audience of the movement, which globally entails pro-labor and progressive forces. This larger identity is suggested, for instance, through messages such as: 'To corporations, we are not humans, we are consumers' (April 25, 2017) or 'We pay fair taxes. Why don't they?' (April 23, 2017).

**Figure 3 – Example of FF15's discourse toward pro-labor and progressive forces**



The two contrasting ways that 'we' is used in the FF15 discourse - referring either to fast-food workers or to progressive forces - also apply when analyzing how FF15 defines its enemies; the enemy of rising inequality is designated as either the 1 percent (as opposed to the 99 percent) or big business. Among these big businesses, McDonald's has been a particular focus of FF15's communications. McDonald's is an ideal target for a low-wage workers' movement. It is the world's largest food service company

with over 36,500 stores in 190 countries, employing around 2 million people. It is also highly profitable, and its practices have been emulated by many of its competitors. McDonald's also has a long history of 'low road' employment practices and sophisticated union-busting tactics (Royle, 2010).

## **6. OWM: the emergence of a solidarity bonding model**

Like FF15, OWM was started in 2012. Between 2012 and late 2014, it was formally an independent organization but was in fact funded and led by the UFCW – another major services-focused labor union. OWM took a major turning point in December 2014 following the election of Marc Perrone as the head of UFCW, when the newly elected president considered the OWM campaign was too expensive and its outcome too uncertain. Consequently, the UFCW decided to cut OWM's budget by 60 percent. The union then chose to stop the campaign's 'internal organizing' activities and to dedicate the remaining resources to a public relations campaign called 'Making Change at Walmart'. However, the ex-OWM campaign director and a few former organizers decided to independently pursue the 'internal organizing' effort despite the UFCW's withdrawal. The new and fully independent entity maintained its activities under the name 'Our Walmart'. The following analysis focuses only on the new OWM organization, which started in early 2015.

### **6.1. OWM organizational form: a crowd-sourced network of workers**

Given its very restricted financial resources, the re-created OWM organization could no longer rely on a large professional and dedicated staff to lead its internal organizing activities. As a consequence, establishing a horizontal and crowd-sourced organizational structure was seen as an efficient way to reach out to workers despite scarce resources. As an OWM national organizer put it:

*'As organizers, our role is to empower as many employees as possible. We have a program for Associates to become organizers. One of the huge commitments of Our Walmart has always been, as a part of UFCW and now as an independent organization, to empower as many Walmart Associates as possible to become organizers. No one has a better understanding of the work, what it's like to be there than former workers themselves.'*

Converting employees into organizers was one of the only ways to reach other employees without having hundreds of local organizers having to work in the field all across the country. To support this 'by workers and for workers' stance, and because of their limited resources, OWM heavily relied upon ICT to reach the hundreds of thousands of Walmart employees who were spread across the thousands

of supercenters throughout the US. The importance of ICT as a tool for dialogue becomes apparent when contrasting the amount of interaction on the OWM and FF15 Facebook pages. A message posted on the OWM's Facebook page generates an average of 945 reactions (either likes, shares or comments) compared to 730 for a post on the FF15 Facebook page. The average engagement on OWM's Facebook page is therefore 30 percent higher than on FF15's, while FF15's Facebook audience is six times larger. The average number of reactions by the Facebook pages' followers is then nine times more for OWM than for FF15.

**Table 2 – OWM and FF15 Facebook pages interaction statistics (October 2015 – May 2017)**

	OWM	FF15
<b>Followers (as of July 2017)</b>	50,187	327,858
<b>Average engagement per publication</b> <i>(engagement = number of 'likes' + 'comments' + 'share')</i>	945	730
<b>Average engagement per publication and per 1,000 followers</b>	19	2

The launch in November 2016 of the mobile phone application 'Work It' constituted a novel and further step into OWM's crowd-sourced approach. Specifically designed for Walmart employees, the application follows two objectives: to serve as a handy guide to better-known internal regulations and policies at Walmart and to be a tool whose content is improved and enriched by the employees themselves, through sharing their own practical experience.

To sum up, while FF15 mostly uses social media to unilaterally inform its followers, OWM relies on ICT to create a direct dialogue with workers.

## **6.2. OWM discursive strategy: crowd-sourcing solidarity to re-create workers' pride**

The analysis of OWM's communications shows how organizers are using social media as a tool to crowd-source information, ideas and opinions. OWM, for instance, directly asks employees to share their practical experiences of everyday dysfunction at work, in order to show that issues often considered as individual or local actually relate to more global and company-level deficiencies. They also invite employees to denounce unfair practices by management and to engage in individual or collective complaints. OWM also frequently calls for ideas to reform working and employment conditions, notably with regards to sick leave policies. OWM's orientation toward dialogue is confirmed by the analysis of interactions on its Facebook page. Discussion on the Facebook page proves to be most active when OWM asks its online 'friends' to express their opinion about Walmart's



profit-sharing policy, their ideas to reform the company's sick leave policy, or their feelings about the fairness of the wage scheme or the frequent cuts in working hours.

In addition to crowd-sourcing information and ideas, OWM's communications also clearly aim to develop a feeling of professional pride among workers, as the workforce at Walmart are generally associated with a negative professional identity of being low-skilled, poorly recognized, part-time, low-wage and unstable workers. In view of this, OWM aims to rebuild a sense of work and workplace-based solidarity. OWM's posts on Facebook regularly pay homage to the courage of the Walmart employees, presented as everyday working heroes dealing with hard working conditions and multiple constraints: nightshift working, pushing carts outside in all weather conditions, dealing with managers' inconsistent instructions, working in under-staffed teams and facing angry customers without the necessary means to satisfy them. OWM's communications thus show the key roles played by ordinary employees in the good functioning of the stores. They regularly highlight how a majority of Walmart's frontline workers manage to compensate for the company's poor management through their great daily investment in work. By doing so, OWM's discursive strategy praises the conscientiousness and work ethics of Walmart's workers.

To support its work-based solidarity strategy, the tone adopted by OWM on Facebook deliberately mimics the communication of an ordinary Walmart worker addressing his colleagues. The style is explicitly horizontal, direct and familiar. As any Walmart colleague might do, OWM regularly uses jargon, makes insider jokes, and uses slang and memes – photographs made popular on the Internet for their humorous misuse ('All the time!', 'So true!', 'Who can relate to this?').

In this way, discussions look like exchanges between peers or members of the same working family, with a slice of office humor, dealing with recurring themes: the long-awaited weekend, the uselessness of the managers, the classical 'Monday morning' anxiety, or the stressful store managers being frightened by the arrival of head-office managers. Adopting such a communication style is, for one OWM director, the only way to sustainably create strong ties with Walmart employees:

*'If you use traditional approaches, like Walmart Watch or Wake Up Walmart, Walmart answers: "They are outsiders. They are not Walmart workers". I mean, these campaigns were effective for a little while but Walmart was able to rebuild its PR and its image, and did all sorts of minuscule changes...But we found that workers were not reading that...It was a part of the limitations of what these campaigns were capable of doing. Even for myself, as an organizer, I don't believe in building a campaign that's not based on the people who are trying to make that change.'*

**Table 3 – Contrasting FF15 and OWM discursive strategy and organizational structure**

		<b>The intersectional solidarity bridging model <i>FF15</i></b>	<b>The professional solidarity bonding model <i>OWM</i></b>
Organizational form	Organizational form	Primarily a network of organizations and movements	Primarily a network of individuals and workers
	Type of coordination	‘Grasstop’: key decisions made centrally but certain leeway for allies to perform ground-work	‘Crowd-sourced’: attempt to favor horizontal and peer-to-peer interactions
	Leadership	Active and top-down maintenance of a network of participants	Framing debates to encourage bottom-up participation
	Expertise	Outsourced to professionals and specialists	Distributed among participants
	Boundaries	Unclear: quickly evolving from city to city and sector to sector	Unclear: various modes of individual engagement
	Amount of resources	High-intensive	Low-intensive (limited resources)
	Main purpose of social media and ICT	Relatively marginal: to inform participants and sympathizers	Relatively central: to create a peer-to-peer dialogue
Discursive strategy	Type of discursive strategy	Bridging and intertwining various causes (economic, social, gender, ethnic justice, etc.)	Engaging workers by recreating ‘work pride’
	Who are the ‘we’?	The creation of new intersectional working-class ‘icons’	Actual Walmart workers (the ‘associates’)
	Forms of solidarity	Mostly citizenship- and community-related	Mostly work- and workplace-related
	Who are the ‘them’?	Symbolic targets: the ‘1%’ and big business such as McDonald’s	Mainly Walmart managers and Walmart shareholders/CEO

## 7. Discussion

The emergence of ‘intersectional solidarity bridging’ and ‘professional solidarity bonding’ models contributes in two ways to the current debate in organization theory and employment relations. First, it recasts the current debate about the organizational structure of the ‘organizing’ model. It suggests how a move from an ‘organizing’ to a ‘networking’ paradigm can help us understand how the organizational limitations previously evidenced by the literature may be overcome. Second, it discusses the discursive strategies associated with these two novel forms of labor ‘networking’.

### ***7.1. Overcoming the organizational burden: from an 'organizing' to a 'networking' paradigm***

Our analysis suggests that the shift from an 'organizing' to a 'networking' paradigm may explain how the limitations of previous 'organizing' models can be overcome (Hurd, 2004; Martinez-Lucio, Marino, and Connolly, 2017). Arguably influenced by the firm desire to get rid of the bureaucratic and oligarchical forms of 'business unionism' (Fantasia and Voss, 2004), scholars debating 'organizing models' have focused to a great extent on the degree of centralization and verticality that labor 'organizing' structures should implement. While some advocate for organizational structures to be as flat as possible (Turner and Hurd, 2001; McAlevey, 2015), others argue that relatively top-down and expert-based organizations are necessary for efficiency (Bronfenbrenner and Hickey, 2004; Heery et al., 2000). More recently, some have called for a third and integrative way by stating that 'organizing' should combine a grassroots approach piloted from a more top-down structure (Milkman, 2006, Simms, 2007, Engeman, 2015). These debates still feature certain limitations. First, Hickey, Kuruvilla and Lakhani (2010) suggest from their meta-study that none of these three forms of 'organizing' is intrinsically superior to the others. Second, and probably more importantly, we suggest that these debates do not adequately engage with two key challenges to 'organizing', i.e. they fall short in discussing how to remove or at least soften barriers to participation (Byron et al., 2010), and they only discuss how much participation is needed to increase 'organizing' efficiency and miss the question of what types of participation could support 'organizing' efforts.

The move from an 'organizing' to a 'networking' paradigm provides some insights regarding these two questions. First, the move from an 'organizing' to a 'networking' approach suggests efforts to erode the clear internal and external organizational boundaries. The 'networking' paradigm can indeed be characterized as an attempt to view membership in a more gradual and less binary way when compared to more traditional 'organizing' models (Freeman & Rogers, 2002). Second, beyond quantitatively questioning how much participation is necessary for organizing, we evidence that the 'networking' paradigm also suggests novel types of participation. In these new 'solidarity' models, we suggest a shift from a model where participation is aggregated and synthesized by organizers to a model where peer-to-peer participation is facilitated and framed by organizers. We also suggest an equivalent shift to a new 'grassroots for workers' model. While unions have frequently been blamed by their partners for managing coalitions in too dominant a way (Frege, Heery and Turner, 2004; Hetland, 2015), the grassroots way of managing allies' participation suggests a newer and more flexible approach to labor division between allies.

## **7.2. Manufacturing a novel labor imaginary**

To answer the pressing call to re-imagine labor discourse and identity (Hyman, 1999; Simms, 2012), two strategies have thus far been suggested in the industrial relations literature. Our two 'intersectional' and 'professional' discursive strategies partly resonate with these two broad prescriptions, but also significantly diverge from them.

On the one hand, some scholars have been calling for a renewed class-based rhetoric capable of re-uniting workers despite the diversity of their work experience and labor relations (Simms, 2007; Voss, 2010). According to Voss (2010: 378), the need to create a new collective identity derives from the fact that unions' identity *'(...) constructed around the identities of core workers once predominant in the working class (most notably, male workers employed full-time in manufacturing) has not yet been replaced by any new global identities successfully challenging the old core identity'*. Our investigation of the FF15 discourse suggests that they have managed to re-construct a largely encompassing collective identity. We nonetheless concur contra Simms (2012) that FF15 has done so by developing a rhetoric that goes beyond traditional class-based discourse. As already suggested by Tapia, Lee and Filipovitch (2017), FF15 has indeed been elaborating an intersectional rhetoric which incorporates gender and race issues into the economic class-based discourse. Our analysis therefore suggests that FF15 has manufactured a new working-class imaginary by intertwining these various causes. In view of this, we suggest that the FF15 intersectional discourse is not only used to evidence how belonging to various socially oppressed categories creates deeper forms of oppression (McBride, Hebson & Holgate, 2015), but also enables a discursive bridge between workers and activists which is sensitive to various factors such as gender, race and families.

On the other hand, Heckscher and McCarthy (2014) have suggested an alternative strategy to renew and reframe 'organizing' discourses by advocating the creation of a labor 'open-ended' identity. They argue that unions should no longer try to impose a prefabricated collective identity but should let workers and their allies freely compose it through individual interactions. While cases of spontaneous creation of movement identity have already been reported in traditional industries such as the automotive industry (Atzeni, 2009), our two case studies suggest that engaging 'hard-to-reach' workers on a large scale still requires external leadership in order to fabricate a discourse and a collective identity. A top-down discourse manufacturing process was indeed obvious in the FF15 case. But even in the more participatory OWM initiative, we suggest that the leaders have played and will continue to play a significant role in pre-defining collective identity around workplace issues.

Our analysis opens two intriguing avenues for research. First, it calls for a further investigation of labor organization ambidexterity (Raisch and Birkinshaw, 2009), that is, the creation of an organizational

model that could combine the strength of both the 'solidarity bridging' and 'solidarity bonding' models. Second, one might ask whether and to what extent these models could be exported internationally. The existing literature has already shown that each national 'organizing' strategy is heavily bounded by national history and context (Heery et al., 2000; Carter and Cooper, 2002; Connolly, Marino, and Martinez-Lucio, 2017). As such, future work could investigate how the organizational structure and discursive strategies of these models might be adapted to local realities.

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# Conclusion

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I began this dissertation by assuming that unionism was eroding because it was no longer adapted to its changing social and economic environment. To describe this changing context, I elaborated upon Bauman (2000), who suggested that the decline of unionism was the result of a move from a solid to a liquid modernity. In the course of writing this PhD dissertation, I have been studying how unionism can be renewed by adapting to such a changing environment, that is, by moving from the 'existing solid' model to an 'imagined liquid' one.

This doctoral project makes three main contributions to the IR literature about unionism renewal. Firstly, it shows how the metaphors that have emerged from this study help to enlighten the union liquefaction process. Secondly, it suggests parameters that may positively or negatively influence the union transformation process. Its third contribution relates to methodology and shows how data gathered from social media can enrich and complement existing IR research strategies.

After detailing the three main contributions of this doctoral work, I will review its limitations and will conclude by discussing the research avenues that it opens up.

## **1. Contribution #1: three metaphors for making sense of the liquefaction of unionism**

The dissertation firstly contributes to IR literature by proposing three different metaphors to make sense of the liquefaction of unionism. These are the metaphors of the monster, the flashmob and the network.

The combination of these metaphors helps to answer our research question by evidencing two dramatically distinct outcomes to which the union renewal process may lead. The metaphor of the monster clearly indicates failure, while those of the flashmob and the network illustrate success. As such, these images recall Bauman's view that 'liquid modernity is an age of both chances and dangers' (Davis, 2013:7). At a first and very general level, these metaphorical images lead to the conclusion that the liquefaction process of solid unionism may either negatively lead to the dissolution of unionism or positively engender the fluidization of unionism.

Table 1 - Contrasting the three cases according to their state of liquidity

Case	State of the union	Solid	Liquid
SFPO	Labor relations context	<i>stable and unified</i>	
	Organization structure	Pyramid	Shapeless
	Role of ICT	Marginal	Central
	Forms of leadership	The expert, the elected	Vocal
	Collective action	Planned and ritualized	None
	Forms of solidarity	Collective cohesion	Individual expression
	Temporal horizon	Anchored in the past	Trapped in present

➡ **Monstrous unionism**

Fight for 15	Labor relations context	<i>precarious + fragmented</i>	
	Organization structure	Grasstop	
	Role of ICT	Relatively important	
	Forms of leadership	Moderator	
	Collective action	Flashmob-like	
	Forms of solidarity		Intersectionality
	Temporal horizon		The next "move"

➡ **Flashmob unionism**

OUR Walmart	Labor relations context	<i>precarious</i>	
	Organization structure		Crowd-sourced
	Role of ICT		Very important
	Forms of leadership		Aggregator / facilitator
	Collective action		
	Forms of solidarity	Workers' pride	
	Temporal horizon		The next "move" (?)

➡ **Networked unionism**

However, beyond ‘nicely’ demonstrating the positive and negative outcomes of the union liquefaction process, each of these metaphors also aims to enrich the IR field by suggesting novel theoretical perspectives. The three metaphors provide consistent heuristics (Cornelissen, 2005) that synthesize how the six dimensions that compose the unionism model have been altered throughout these renewal processes. Theorizing through metaphor aims to open novel conceptual avenues for IR by associating the familiar concept of unionism in IR studies with concepts from other academic fields, such as the monster (political science, cultural studies, science and technology studies), the flashmob (social movement studies) and the network (organization studies, network theory, communication studies).

### ***1.1. Using the monster metaphor to exemplify the failed renewal of union democracy***

In chapter 1 of this dissertation, we proposed the metaphor of the monster to exemplify a case of failed renewal. More precisely, this image is used to make sense of the failed attempt to liquify the union’s democracy by adopting social media. As indicated in table 1, the existing and solid components of the union model are dramatically different to those of the newly created liquid democracy model: their organizational structure, use of ICT, form of leadership, form of solidarity, type of collective action and their time perspective. As a consequence, the newly created digital and highly liquid entity came to threaten the existing solid democratic model so that union leaders had no other option than to try to keep the dangerous digital beast at bay.

The metaphor of the monster contributes to the IR literature by providing an alternative explanation for the failure of unions to renew as a consequence of ICT. Until now, scholars have been of the view that unions will fail to renew their model through digital technologies because they will replicate their existing solid model online. Kerr and Waddington, for instance, state that unions fail to revitalize through digital technologies because ‘the pattern of their use replicates more traditional practices’ (Kerr and Waddington, 2013:677). Other scholars have reached very similar conclusions, suggesting that unions fail to engage interactively with their members because they merely digitalize their traditional top-down ways of communicating rather than significantly altering them (Rego et al., 2016; Fowler and Hagar, 2013; Panagiotopoulos and Barnett 2015). Geelan and Hodder (2017) go even further by suggesting that far from facilitating the distribution of power among members, ICT instead contributes to strengthening the centralized power of unions. As they put it, the ‘central control over official pages continues to allow unions to use technology to stifle debate’ (Geelan and Hodder, 2017: 347).

Our empirical study in chapter 1 contradicts this generally accepted assumption. The monster metaphor clearly suggests that the union failed to renew through ICT precisely because it did not

manage to exert proper control over the newly created digital space. Rather than just dematerializing existing and well-controlled communication channels, ICT can create a space that escapes the centralized control of the union and progressively becomes threateningly autonomous.

The image of the monster depicts the failed renewal as the result of a clash between two distinct models and cultures of unionism. This metaphor creates a bridge with the political science (Ingebresten, 1998) and cultural studies (Cohen, 1996; Mittman, 2012) literature, which already suggests that the confrontation of two different political models can lead to an escalation process which eventually results in monstrifying the evil 'others'. The monster metaphor therefore depicts this failed experiment as the brutal confrontation between two normative approaches to 'good' democracy and the related expectations of 'good' behavior by members and leaders.

This metaphor also creates a bridge between IR and the science and technologies studies (STS) literature that discusses the failure of ICT-related organizational change (Law, 1991; Bloomfield and Vurdubakis, 2005; Latour, 2011). It shows how such failure can lead to situations that are considered as both abnormal and abject. In chapter 1, I also concur that actors' emotional states – including fear, anxiety, anger and hate – are a key component for understanding the causes and consequences of this failed union renewal experiment.

### ***1.2. Using the flashmob metaphor to exemplify a renewed form of collective union action***

In chapter 2, we also used the metaphor of the flashmob to exemplify the successful case of a union's collective action renewal. As figure 1 indicates, the metaphor depicts a case of semi-liquid unionism, as the flashmob unionism model corresponds to an intermediary stage between liquidity and solidity along all the six dimensions of the unionism model. I believe that the flashmob metaphor can contribute to the debate about the renewal of unions' collective action in two ways.

First, the flashmob metaphor aims to enrich the IR literature by drawing attention to recent developments in social movement studies. The IR field has often borrowed theoretical insights from the social movement literature to improve our understanding of unions' collective action (for eg. Kelly, 1998; Gahan and Pekarek, 2013). However, I contend that the field has not yet taken account of recent developments relating to liquid forms of collective action (Bennett and Segerberg, 2012; Castells, 2012; Gerbaudo, 2012). The flashmob metaphor aims to show precisely how the IR literature can borrow from this flourishing academic field. This specific form of artistic performance evokes more general categories of novel collective action, such as smart mobs (Rheingold, 2002), or connective actions

(Bennett and Segerberg, 2012), whose relatively recent theorization may help to sharpen IR conceptual lenses.

Second, by comparing unions' collective action to an artistic performance, the flashmob metaphor aims to emphasize the stakeholders' perceptions of that collective action, an aspect that has been only infrequently discussed in IR. So far, most contributions in the field have focused on mechanisms that motivate workers to take collective action (Kelly, 1998; Atzeni, 2009; McAlevey, 2015): the main emphasis is therefore on participants of collective action. As such, this literature only marginally discusses the effects on external stakeholders produced by these mobilizations – the work of Lévesque and Murray (2013) being probably one of the few exceptions. Under this perspective, using the image of an artistic performance also invites us to consider how the audience perceives such collective action, particularly in terms of legitimacy and acceptability. The metaphor further indicates that unions' collective action can be considered as being 'staged', which invites us to look methodologically at both sides of the stage to evidence a potential disconnection between the perception of collective action 'on stage' and the actual process by which it is created 'off stage'.

### ***1.3. Using the network metaphor to exemplify renewed forms of union solidarity***

The third metaphor developed in this dissertation is that of the network. It has been used to exemplify two cases of unions successfully renewing their solidarity-creating strategy. As was the case with the flashmob, the metaphor of the network illustrates semi-liquid union models whose key dimensions lie between solid and liquid states.

It should be noted that the metaphor of the network has already been used elsewhere in the IR literature (Martinez Lucio and Walker, 2005; Martinez Lucio, Walker and Trevorrow, 2009; Wood, 2015). However, where these authors have metaphorically used the network, they have primarily done so to discuss the potential of ICT to renew unionism. In our case, the potential of the network as a metaphor is arguably pushed one step further. By suggesting a move from an 'organization' to a 'network' paradigm, our work invites the theoretical discussion to be reframed along all six dimensions of the unionism model.

As already suggested by Juris (2008), the network metaphor also enables us to connect concepts and theories from a large array of horizons. In our case, the metaphor mainly contributes to IR discussions about the following three concepts: the form of solidarity, the organizational structure of the union and the form of leadership.

Importing network theory concepts such as 'bridging' and 'bonding' (Putnam, 2001) enables us to formulate two distinct strategies for creating labor solidarity. These two ways of creating solidarity

enable us to complement the IR literature, particularly the existing dichotomies between organic versus mechanical (Hyman, 1999; Simms, 2012) or industrial versus collaborative forms of solidarity (Heckscher and McCarthy, 2014), by showing that different forms of solidarity are not necessarily contradictory to each other but may instead be complementary.

The metaphor also invites us to reconsider the debate about the organizational structure of unions by looking at network theory concepts such as crowd-sourcing (Estellés-Arolas and González-Ladrón-De-Guevaran, 2012). Relating IR debate to network theory can enable us to go beyond the existing and rather inconclusive discussion about the ‘right’ union structure, which places the proponents of the top-down and the defenders of the bottom-up approaches in opposition to each other (for a summary of the debate, see Hickey, Kuruvilla and Lakhani, 2010).

I contend that the network metaphor also opens novel avenues for reconsidering the debate about leadership in unionism. Consistent with Heckscher and McCarthy’s work (2014), chapters 2 and 3 of this dissertation have described novel forms of union leadership, particularly in relation to the concepts of ‘moberator’ and ‘facilitator’. By viewing leaders as network managers, the IR field could borrow from network theory about leadership developments, starting, for instance, with the very central concept of the broker (Diani, 2003; Burt, 2004).

In conclusion, this dissertation contributes to the IR literature through three metaphors which illuminate the transformation of unionism into more liquid forms and open theoretical avenues to enrich the field of IR. In what follows, I will present the second contribution of this doctoral project by discussing the parameters which can facilitate or prevent the transformation from solid to liquid unionism.

## **2. Contribution #2 – Fluidization or dissolution: how to explain different outcomes for (apparently) similar transformation processes**

The second contribution of this dissertation is to formulate a hypothesis concerning the parameters that can influence the transformation process from a solid to a liquid model of unionism. More precisely, I review how the approach to the renewal of unionism (conservative versus disruptive), the type of organizational hybridization (compartmentalizing versus integrating) and the nature of the processes (collective action versus collective decision-making) may facilitate or impede the hybridization of liquid and solid organizational forms.



### **2.1. Conservative versus disruptive approaches to the renewal of unionism**

Our study suggests that the outcome of the transformation process will largely depend on a union's approach to renewal. I contend that more disruptive approaches are more likely to lead to successful transformation while more conservative approaches will lead to failure. I further suggest that these approaches may themselves be largely contingent on their context. Indeed, it appears that the two disruptive and 'liquid' approaches in our study emerged in a highly liquid environment while the more conservative and 'solid' approach of the Quebecois union can largely be attributed to the relative solidity of its environment.

The first case of renewal failure took place in the stable and solid environment of the Quebecois public services administration. The union is a well-established union, which has operated for many decades in a unionized workplace. The union has a 'secure' monopoly and has been generally unchallenged by other unions. Overall, the Quebecois union is not facing a serious short-term threat to its survival and its financial income is secure. As a result, its leaders had no objective reasons for initiating a highly ambitious renewal strategy. On the contrary, preserving and defending the existing social benefits was seen to be a reasonable and desirable objective. Unionism renewal is globally understood as the changes required to secure the existing model. This conservative approach to unionism renewal largely echoes Bauman's (2000) definition of the solid modernity project which 'must serve the maintenance and the perpetuation of the orderly whole' (p55). This does not mean that the union was totally incapable of evolving. In recent years, the union has, in fact, implemented relatively substantial organizational changes to follow the evolution of public services or to revitalize local union structures. However, its approach to renewal has been strongly influenced by the paradoxical injunction of changing to remain the same.

The two cases of successful transformation occurred in dramatically different environments. Both were guided by a clearly more disruptive ambition. As described in the introduction, the cases of *Fight for 15* and *OUR Walmart* took place in highly liquid contexts. In addition to the *laissez faire* logic of their national industrial relations systems, the two labor movements focused on the highly liquid retail and fast food sectors, characterized by low-paid and precarious jobs. Importantly, the two US unions tried to penetrate sectors where existing forms of unionism had historically proved to be inoperative. They felt that they could only employ a disruptive renewal strategy as only a significantly novel form of unionism would have a chance to succeed.

It should also be noted that both the SEIU and UFCW have long cultivated this more disruptive approach to renewal. In 1995, both unions participated in the creation of the 'Change to win' coalition that succeeded the AFL-CIO, which was considered to be too inactive and hence deadly (Fantasia and

Voss, 2004). In the case of the SEIU's *Fight for 15*, in particular, the movement can be seen as the extension of a series of disruptive campaigns from the iconic 'Justice for Janitors' campaign at the beginning of the 1980s to the more recent 'Fight for a fair economy' campaign in 2012. In summary, the two cases of successful transformation can be related to their highly liquid context which has been preparing the way for disruptive union renewal approaches.

In conclusion, I concur with Rose and Chaison (2001) that national and sector contexts can greatly influence the approach to the renewal of unionism. I further suggest that stronger external pressure from the liquid environment prompts unions to develop more disruptive forms of innovation. In this respect, unions operating in a more liquid environment are more likely to engage in more substantial forms of transformation. Borrowing the expression formulated by Hauptmeier and Turner (2007), unions that evolve in a more liquid environment may benefit from the 'advantages of backwardness', whereas unions embedded in a more solid environment may be more limited in their ability to initiate renewal strategies.

## ***2.2. Hybridizing organizational form: juxtaposing versus integrating solid and liquid organizations***

I also suggest that the successful transformation from solid to liquid models of unionism may depend on the hybridization strategy of the liquid and solid organizational forms (Battilana and Lee, 2014). Borrowing from Pratt and Foreman's (2000) terminology, I contend that organizational integration might be more fruitful than organizational compartmentalizing.

The comparison of our three cases suggests that hybridizing solid and liquid forms by compartmentalizing them may lead to failure. More precisely, while such a compartmentalization strategy may be sound when the two organizational forms perform two distinct activities (Kraatz & Block, 2008), the Quebecois case (chapter 1) indicates that compartmentalizing two organizational forms that perform one similar activity can lead to failure. I concur that, in such a case, the compartmentalizing of two different organizational forms may lead to organizational dissonance (Ashcraft, 2001). Cases of hybridization failure due to offline–online compartmentalization have been reported elsewhere in the literature (notably Chadwick, 2011). This also strongly resonates with Bennett, Segerberg and Knüpfer (2017) who attribute the failure of traditional political parties to evolve to digital technologies being 'just grafted onto existing bureaucratic organization' (p3).

Cases of successful hybridization are characterized not by compartmentalization but by the integration of liquid and solid organizational forms. This point can be illustrated by the 'grasstop' organizational form of the *Fight for 15* movement, which combines certain elements of solid bureaucracy, such as

relative centralization and the use of specialized experts, with elements of liquid organizations, such as a high propensity for change and relative decentralization of local mobilizing activities. It should be noted that the successful mixing of solid and liquid elements has occurred through the *ad hoc* creation of campaign organizations. The successful hybridization may thus be attributed to the creation of new and project-based campaign organizations, which reduces or even does away with the need to change existing routines, processes, habits or beliefs.

### ***2.3. The type of activity to be liquified: collective action versus collective decision-making***

The overall analysis of our empirical cases suggests that union processes show different propensities for liquefaction. At a very general level, it appears that collective actions may be easier to liquify than democratic processes of collective decision-making. This may be explained by the different natures of the processes on which they rely. I suggest distinguishing between two types of activity: collective action on the one hand, which primarily involves processes of accumulation and diffusion, and collective decision-making on the other, which mainly involves processes of condensation and synthesis.

In all three empirical cases, it has been shown that the unions' collective actions have experienced some degree of liquefaction. The higher propensity for collective actions to be liquified may be explained by the fact that they rely to a great extent on processes of accumulation and diffusion, in which more means better. Social media appears to play a substantial role in transforming unions' collective action, as the literature already suggests (Wood, 2015). By using social media, unions can diffuse information to a wider audience and in a cheaper and faster way. Social media's basic functionalities, such as 'shares' on Facebook or 're-tweets' on Twitter, largely contribute to facilitating and accelerating these types of communication flows. Collective action processes of accumulation also seem to be positively transformed through social media. Instances of processes of accumulation that were improved as a result of social media are also to be found in our three case studies: 'polling' the membership through the accumulation of opinions, evidencing collective injustice through the accumulation of testimonies, increasing creativity through the accumulation of new ideas and evidencing power through the accumulation of signs of support (by accumulating 'likes' on Facebook or hashtags on Twitter so they become a trending topic), etc.

I suggest that large-scale collective decision-making activities may be harder to liquify than collective action, as has already partially been shown by the literature (Bennett, Segerberg and Knürpf, 2017; Dobusch et al., 2017). This lower propensity to be liquefied may be explained by the fact that collective decision-making foremost involves processes of condensation and synthesis. In this regard, the

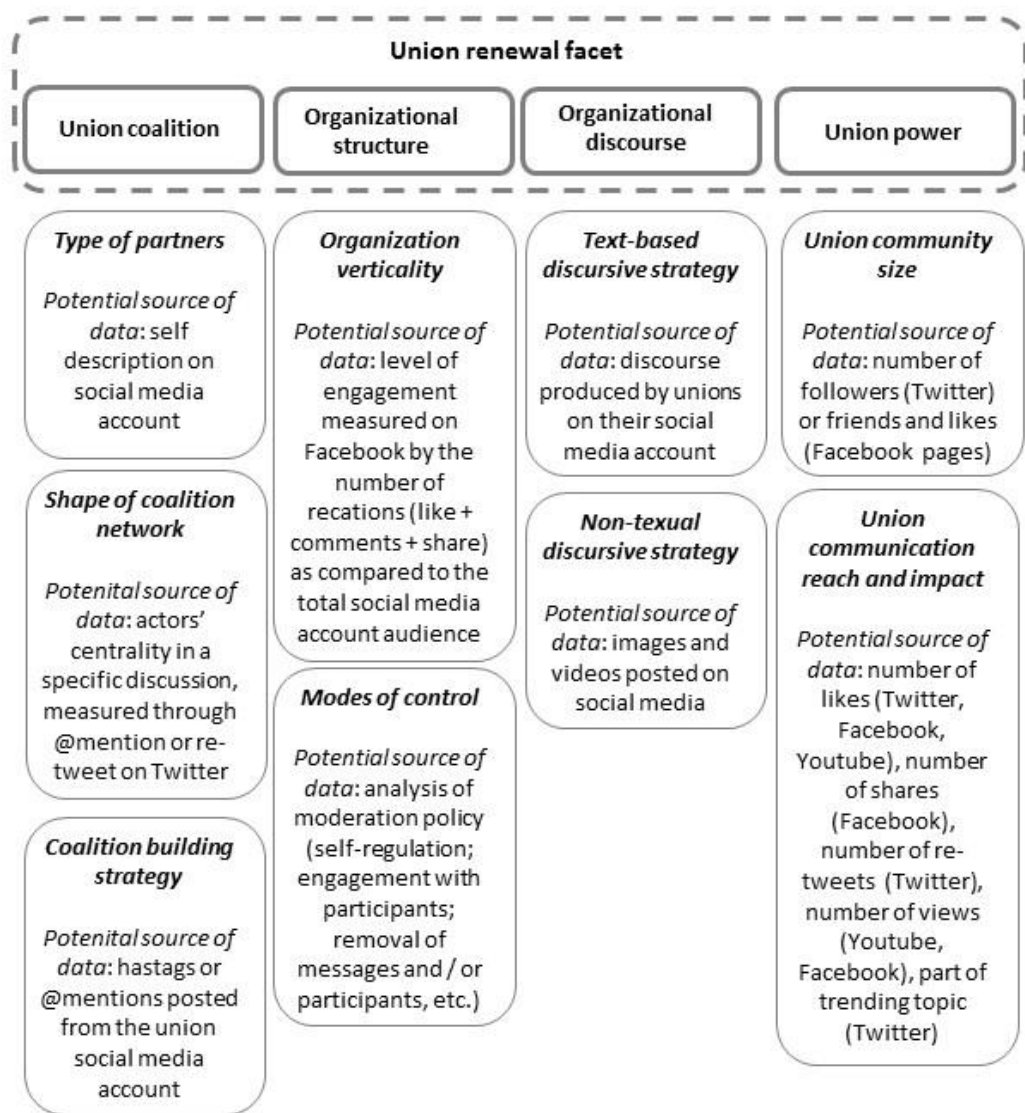
configuration of social media may significantly prevent the successful fluidization of collective decision-making activities. I observed that it was not possible for the contributions of online participants in social media to be categorized or grouped. For instance, it was almost impossible to refine the raw material constituted by new ideas and suggestions generated online into a coherent set of proposals to be collectively discussed. I am of the view that social media has a low capacity to condense and synthesize due its key organizing logic. On Facebook and Twitter, contributions are mainly organized chronologically: messages follow one another according to their date of publication, independently from their thematic coherence. Social media does not allow messages to be grouped according to their theme, their stance or their nature. In the long run, this makes it very hard, if not impossible, to engage in constructive collective decision-making. Rather, social media engenders a collective amnesia which turns collective decision-making into a Sisyphean task.

The second contribution of this dissertation to the unionism renewal literature is therefore its identification of three parameters which can facilitate or prevent the fluidization of unions: the approach of unions to renewal, their hybridization strategy and their type of activities. We now move on to the dissertation's third contribution, which is to highlight the potential of social media as new source of data.

### **3. Contribution #3 – Using social media data to enrich the union renewal literature**

The third contribution of this dissertation to the unionism renewal literature relates to methodology. Until now, interviews and participant observation have been the dominant strategies for qualitatively assessing union renewal processes (for example, Simms, 2012; Tapia, 2013; Connolly, Marino and Martinez Lucio, 2017). Questionnaires and official statistics have been the favored sources of information for quantitative research (Fiorito, Jarley and Delaney, 1995; Friedman, 2007; Baccaro and Howell, 2017). Our three original research methodologies indicate that social media may represent a novel and significant source of data to complement and enrich these more traditional research strategies. In what follows, I summarize how data gathered from social media can offer a fresh way of looking at four distinct facets of union renewal, namely: coalition building, organizational structure, discourse and power.

Figure 1 – Potential of social media data to analyze key dimensions of unionism renewal



3.1. Using social media data to analyze union coalition building

First, social media represents a very rich source of data to analyze union coalitions, a key element in union renewal strategy (Frege and Kelly, 2003; Milkman and Voss, 2004). More precisely, our investigation through Twitter of the *Fight for 15* movement suggests that social media can help to capture three aspects of union coalitions: the diversity of partners, the structure of the coalition network and the coalition-building strategy. With regard to the composition of the coalition, social media can provide two types of information: the main purpose of the actors partnering with the union (pro-labor organizations, labor unions, political parties, civil society organizations, etc.) and the type of actors (individuals or organizations). Social media is also a rich source of data for mapping out the structure of the coalition network. As social media provides directional relation data, it enables a quantitative approach to be taken to relations between actors by evidencing their frequency and their

direction (for example, who mentions or re-tweets whom). In this respect, our analysis of the centrality of actors in the *Fight for 15* movement (chapter 2) provides a good illustration of how a coalition network structure can be charted thanks to social media data. Social media data can also help with analyzing a coalition-building strategy. In the case of the *Fight for 15* movement (chapter 2), we, for instance, analyzed the frequency of hashtags used by the main *Fight for 15* Twitter account (@Fightfor15) to evidence the partner organizations and campaigns that *Fight for 15* had been endorsing.

### **3.2. Using social media data to analyze union organizational structure**

Second, social media can also be used to help to gather data about the internal organizational structure, another dimension considered as being central to union renewal (Freeman and Rogers, 2002; 2003; Heckscher and McCarthy, 2014).

Social media can help to analyze the hierarchical verticality as well as the type of labor divide between leaders and participants. For instance, in chapter 3 of this dissertation, we used the notion of engagement on social media (average number of reactions on Facebook per message and per follower) to evaluate the respective verticality and interactivity of the *Fight for 15* and *OUR Walmart* organizations.

Data gathered from social media can also help with analyzing other facets of union organizational structure such as their type of control – as our study of the union moderation strategy on social media exemplifies (chapter 1).

### **3.3. Using social media data to analyze union discourse**

Third, social media provides a rich source of data for analyzing organizational discourse (Barros, 2014; Toubiana and Zietsma, 2017), which is also considered an important facet of unionism renewal (Hyman, 1999; Simms, 2012). In this respect, I contend that social media data are particularly well suited to analyzing the degree of liquidity of organizational discourse. As chapter 3 shows, the qualitative analysis of union discourse enables us to distinguish between solid and exclusive forms of discourse, which correspond to a top-down and one-to-many form of communication, and more liquid and inclusive forms of discourse, which correspond to horizontal and many-to-many modes of communication (Bennett and Segerberg, 2012).

Even if we use it in a limited way in this dissertation, other research about unionism renewal indicates that social media data may pave the way to non-textual discourse analysis through, for instance, the study of videos posted on Youtube (Jansson and Uba, 2018).

### ***3.4. Analyzing union power through social media data***

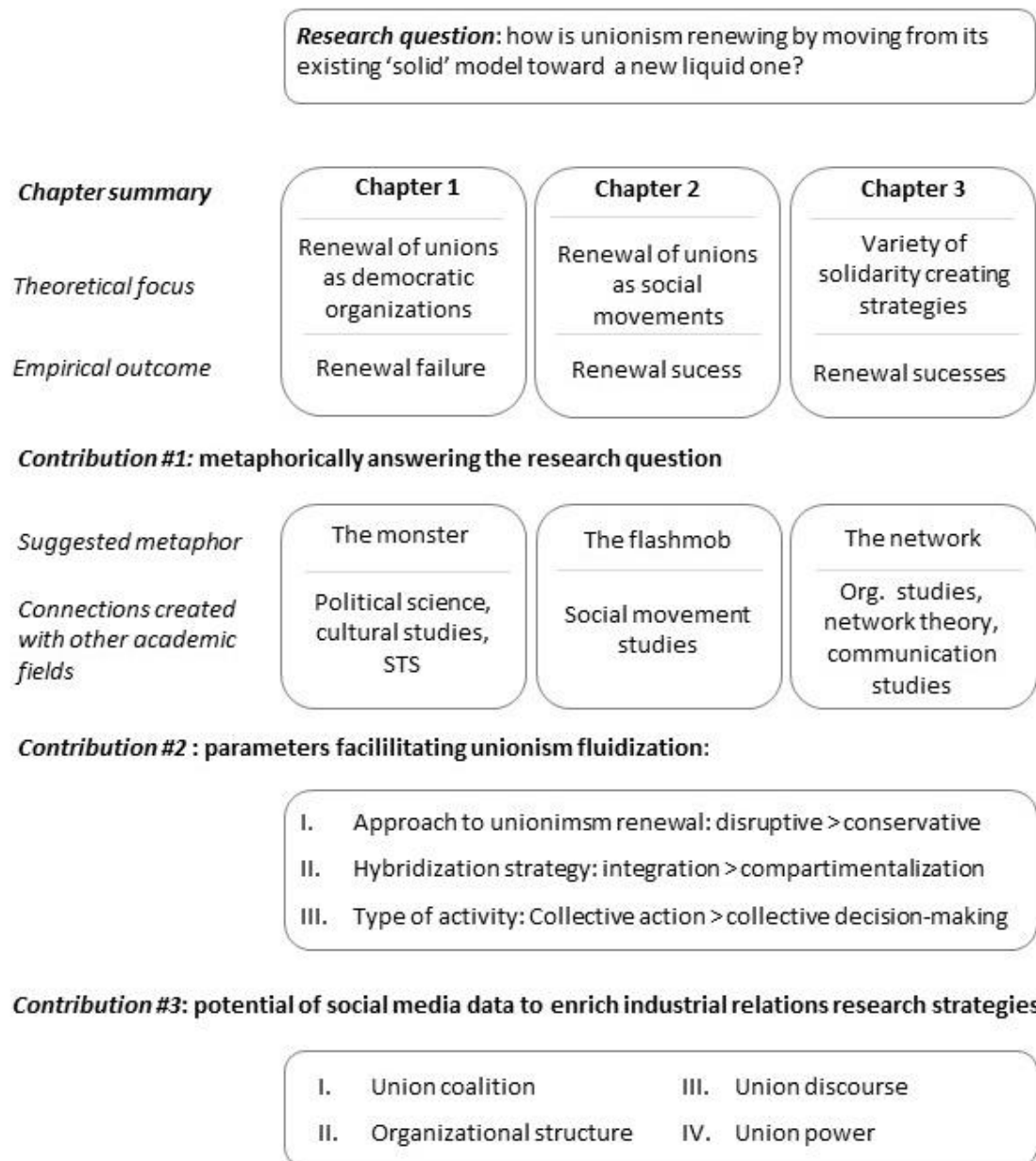
Fourth, social media offers a rich source of data for measuring a growing facet of unions' power, namely their communicational power (Castells, 2009). Traditionally, the power of a union has been measured through indicators such as union membership, union density, the number of strikes or the number of working days contributed to strikes per workforce member (see, for example, Friedman, 2007; Baccarro and Howell, 2016).

I contend that social media offers unprecedented access to data that can help with measuring the reach and the influence of unions' communications. As well as using the traditional measures of union membership, the number of followers on Twitter or the number of friends on Facebook can help with measuring the union's community, which includes sympathizers as well as official members.

Social media also provides data to help measure the union's 'media noise'. The reach of union communications can, for instance, be approximated by the number of re-tweets on Twitter, by the number of 'shares' or 'likes' on Facebook or by the number of views and likes on YouTube. The propensity of unions to create an online buzz can also be measured through their ability to initiate a hashtag that becomes a 'trending topic' on Twitter.

This dissertation's third contribution to the IR literature is therefore to show the potential for social media data to complement and enrich more traditional research methods, in particular in studying unions' coalitions, organizational structure, discourse and power. Having presented the three main contributions of this doctoral project (see figure 2), I now proceed to discuss its limitations.

**Figure 2** – Overview of the PhD's main contributions





#### 4. Risks and limitations of the ‘epochalist’ liquid metaphor

As has clearly been shown, this dissertation has been greatly influenced by ‘evolutionist’ assumptions. It is based on the Darwinian hypothesis that unions should be able to change if they are to survive. As such, it considers the old – and in our case the ‘solid’ – form of unionism to be outdated and inappropriate and judges the new – in our case the ‘liquid’ – form to be intrinsically good. The conclusions drawn by this dissertation unambiguously align with these normative assumptions. The ability of unions to become more liquid has been judged positively while their inability to renew has been considered a failure. By univocally celebrating the capacity to change and by criticizing stability, one could argue that I blindly conflate the ‘new’ and ‘liquid’ with the ‘good’. Our normative assumptions indeed invite us to get rid of the traditional old and solid forms of unionism to enable a new and liquid form to be created.

However, some scholars have pointed to the limitations of such dichotomous thinking which places the ‘new’ and the ‘old’ in opposition. In his defense of the arguably ‘old’ IR paradigm, Dunn (1990) ‘warns against being seduced by the attractiveness of the metaphor rather than the robustness of the idea’ (1990:1). Du Gay (2003) – an ardent advocate of the ‘old fashioned’ bureaucratic model – developed a similar line of argument. He calls such a caricatural and limited form of reasoning ‘epochalist’ and defines it as ‘the use of a periodizing schema in which a logic of dichotomization establishes the available terms of debate in advance, either for or against’ (Du Gay, 2003:664). Du Gay (1994) relegitimizes the mocked ‘dusty bureaucracy’ by recalling, for instance, that this organizational form may well be the most suited to support democracy – an idea that can also be found elsewhere in the literature (Olsen, 2008). Hence, by unilaterally considering bureaucracy to be bad and the solid form of unionism as outdated, there is a risk of throwing the baby out with the bath water.

The denunciation of the oversimplifying ‘epochalist’ metaphor then invites us to reconsider the normative premises of the unionism *renewal* field, which could even lead to viewing unionism ‘revitalization’ from a radically different perspective. As a counterpower, the role of unionism is to incarnate and prefigure an alternative to the dominant model (Leach, 2013). Historically, unionism developed around democratic values to act as a counterbalance to the dominant managerialist autocratic model of power (Rothschild and Whitt, 1986). Unions have embraced democratic models to demonstrate that an alternative is both possible and desirable. In a world dominated by liquid forms of power, the ultimate goal of unions as a counterpower may have to go beyond that of merely accommodating the new liquid social settings, as such an objective would not only be limited in ambition but could clearly be counterproductive. The liquefaction of unionism could in fact contribute to strengthening the legitimacy of the dominant liquid model instead of subverting it. It would then

ultimately accelerate the global phenomenon of liquefaction and amplify its negative effects. A more radical alternative, therefore, would be no longer to try to mitigate the evil effects of liquid modernity by sticking to its spirit. Instead, the guiding thread of unionism revitalization would come to deliberately incarnate a desirable form of solidity. In this way, the unionism revitalization enterprise would cease to be one of a quest for 'new' liquidity but could instead become one of relegitimization of solid and 'old fashioned' forms of unionism.

## **5. Avenues for future research**

Of the various avenues for research that this dissertation opens up, there are three that are of particular interest to me for future research projects: the investigation of union renewal in hyper liquid economic sectors; the study of the renewal of unionism through digital technologies designed for union purposes; and the study of the limitations of union liquefaction.

### ***5.1. Research avenue #1: unionism renewal in the hyper liquid economic sector***

The first research avenue involves studying the unionism renewal process in hyper liquid economic sectors. This dissertation suggests that unions' propensity to evolve toward liquid models may vary according to their economic sector. More precisely, I suggest that the more liquid the economic sector the easier the transition toward liquid forms of unionism. Future research could then investigate unionism renewal in the arguably hyper liquid economy, which has been emerging in recent years through the spread of digital technologies. This is also referred to as the platform economy, gig economy (Friedman, 2014) or digital labor (Cardon and Casili, 2015). These new forms of economy can be considered to be hyper liquid as they combine the following characteristics: a very high precarity due to the substitution of work contracts by commercial contracts, a total spatial atomization of the workforce, a growth in very short-term contracts as evidenced by the expressions 'on demand', 'just-in-time' labor or 'micro-tasking' (De Stefano, 2015), and the centrality of ICT in structuring these new economic models (Sundararajan, 2016).

The emergence of such a radically novel and liquid economic form first raises the question of what form unionism should be taking to adapt to such a context. One might, for instance, ask whether unionism in the hyper liquid economy will stick to the 'network paradigm' (see chapter 3) or whether it will open a radically novel – and potentially more liquid – one. One could also speculate about the process of unionism emergence in such a hyper liquid context. Will traditional unions manage to evolve to such an extent that they will become significant and legitimate actors in this new economy? Or will this disruptive economic evolution generate the emergence of radically novel actors, as the work of Heckscher and McCarthy (2014), for instance, suggests?

### ***5.2. Research avenue #2: investigating the potential for tailor-made digital technologies to renew unionism***

A second research avenue could consist in studying the potential of digital technologies specifically designed for union purposes. In this dissertation, only mainstream social media – such as Facebook or Twitter – has been investigated to assess its impact on unionism renewal. Even if social media offers a wealth of opportunities for organizations in general (Treem and Leonardi, 2013) and for labor unions in particular (Wood, 2015), our empirical investigation has revealed some serious limitations of those technologies which have not been specifically designed for union activities – see, in particular, chapter 1.

A study of the renewal of unionism through tailor-made digital technologies could then reveal whether existing social media limitations could be overcome. As we saw in chapter 1, the impossibility of striking a balance between the unions' solid logic and social media's liquid logic eventually led to the rejection of digital technologies. One could then investigate how the union (solid) and the technology (liquid) logics change throughout the development process of a digital technology specifically designed for union purposes. Where unions can shape and design the functionalities of digital technologies, one could investigate whether this greater adaptability would favor or hinder their potential for renewal. On the one hand, one could speculate that the adaptability of technologies would strongly limit their transformational potential because unions would be able to twist the liquid logic of digital technologies to such an extent that they would eventually become solid tools. Alternatively, it could be assumed that tailor-made digital technologies would offer greater potential for renewal, precisely because they make it possible for unions to design a tool that will precisely meet their needs. Studying the development process of tailor-made digital technologies would then enable the identification of the organizational parameters that facilitate or prevent the transformation of unions toward more liquid forms.

### ***5.3. Research avenue #3: studying the limits of union liquification***

A third research avenue could involve studying the limits of the liquification of unionism. The existing IR literature, particularly the work of Heckscher and McCarthy (2014), suggests that unions may be able to reach much more liquid states than those evidenced in this dissertation.

At the same time, both the literature and this dissertation suggest that there may be limits to organizational liquefaction. Indeed, recent literature has shown that organizational liquefaction will also require some sort of solidification (Dobusch et al., 2017; Turco, 2016; Husted and Plesner, 2017). The two successful cases of union fluidification (chapters 2 and 3) also invite us to draw similar

conclusions. The case of the *Fight for 15* movement, for instance, shows a combination of a relatively liquid form of intersectional solidarity with a relatively solid ‘grasstop’ organization structure, and the *Our Walmart* organization shows a relatively solid form of professional identity combined with a much more liquid crowd-sourced organizational structure.

Furthermore, our empirical investigation (chapter 1) and the existing literature suggest that organizations can suffer from an excess of liquidity. Bennett, Segerberg and Knürpf (2017), for instance, reported the case of the German Pirate Party which dissolved because of its inability to regulate and manage the excessive level of participation enabled by its ‘liquid democracy’ online platform.

The question then is to study the potential limits of unions’ liquefaction. Studying unions’ attempts to adopt highly liquid forms, such as the one prescribed by Heckscher and McCarthy (2014), would show whether such a model can be implemented or is destined to collapse due to a lack of consistency. Such an investigation would help to refine our understanding of the limits of union liquefaction as well as the relationship between liquidity and solidity.

## **6. Postlude to the conclusion**

As I conclude my doctoral project, my perception of the global context is far from being as hopeful as it was when I started out five years ago. Most of the countries involved in the ‘Arab spring’ have now been plunged into the darkest winter (Egypt, Lybia and Syria) – apart from the still fragile Tunisian democracy in which the UGTT union is playing a pivotal role (Yousfi, 2015). The political parties that were expected to be disruptive, in many cases, ended up in many cases being much less participatory than anticipated (Bennett, Segerberg and Knürpf 2017; Husted and Plesner, 2017). Some simply disappeared, as did the mass social movements of early 2010s. The gig economy or digital labor totally overshadowed the alternative economic projects of the so-called sharing economy (De Stefano, 2015). Time has also revealed the dark side of the digital revolution. Considered, five years ago, as tools for 2.0 democracy (Rothschild, 2016), digital technologies turned out to become tools for 2.0 demagogism (Fuchs, 2018) – as demonstrated by the increase in digital mass propaganda, widespread online surveillance (Bauman and Lyon, 2013) or the election of the ‘world’s greatest troll’<sup>3</sup> to the White

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<sup>3</sup> Silver, N. (2015, July 20). Donald Trump Is The World’s Greatest Troll. FiveThirtyEight. Retrieved from : <https://fivethirtyeight.com/features/donald-trump-is-the-worlds-greatest-troll/>

House. The negative sides of social media have become so obvious that the former Facebook president Sean Parker blamed himself for having created a 'monster'.<sup>4</sup>

And central to this dissertation, time has shown that unionism has not been quantitatively recovering. Nor has it started to significantly transform and renew – apart from in a few notable cases, including those that I have been lucky enough to observe and comment on. Nonetheless, even if my expectations are far from being met and even if these five years of hard work have not always been a bed of roses, the academic and personal conclusions that can be drawn from this doctoral project are thankfully still full of positivity and hope. Below, I outline some of the things that this personal and professional experience has taught me and which might – in a wider sense – also help those trying to act in the interests of greater social and economic justice.

First, these last five years have taught me how right popular wisdom is when it states that the journey is far more important than the final destination. To make the road followed by this dissertation look as a straightforward as possible, I have excluded references to the many paths that I took, the deadlocks that I encountered, the unexpected deviations which eventually proved to be more enriching than time-consuming and, obviously, the many people inside and outside of academia that I met on the way, and who accompanied me for a short or long leg of the journey. These elements, made invisible in the present document, has certainly been much more enriching for me than this 'polished' dissertation may suggest.

Second, I have learned the value of exploring unknown territory and leaving one's comfort zone. When I started this PhD, I abandoned my comfortable position as a relatively well-regarded, well-paid and established senior consultant and started over again at the bottom of the pyramid. I explored organizations and systems far from my homeland and my familiar landmarks. The highest value one can take from encountering the 'alien', the 'exotic' and the 'other' is probably not the new knowledge accumulated about the outside world but rather the new and fresh insights it provides into the most familiar and taken-for-granted elements of life and – importantly – of oneself.

This experience has therefore taught me that a mix of naivety and firm convictions may well be essential to take challenging projects as far as possible. Without the naive belief that one can improve and contribute to a better understanding of the world, there would be no incentive to start a PhD

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<sup>4</sup>Price, R. (2017, November 17). Billionaire ex-Facebook president Sean Parker unloads on Mark Zuckerberg and admits he helped build a monster. *The Independent*. , Retrieved from : <https://www.independent.co.uk/news/people/sean-parker-mark-zuckerberg-facebook-president-friends-reality-build-a8058751.html>

journey. Without firm convictions – which obviously will come to be challenged and altered– there would probably be no course to follow and no meaningful direction to pursue.

Finally, this PhD journey has taught me that hope is not incompatible with failure and pain but that they may well be co-constitutive. I have discovered that hope without pain and failure may well lead to a dangerously empty compulsion to act. I have also learned that pain and failure without hope may well degenerate into highly destructive frustration.

In the end, this PhD journey has taught me to remain hopeful, but probably in a more careful and more patient way – a process that younger people may well mock as ‘foolishly aging’ but that older people will probably call ‘wisely maturing’. I would like again to thank again all the people who have supported me throughout this PhD journey and who have been a constant source of hope and optimism.

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