Social Movement Theory, Collective Action Frames and Union Theory: A Critique and Extension

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Abstract

The publication of John Kelly's Rethinking Industrial Relations *in 1998 spawned a growing interest among researchers in exploring how social movement (SM) theory can be used to inform union research, particularly in the context of revitalization/renewal debates. Our starting proposition is that this approach can be extended through an engagement with the larger corpus of SM theory. We focus in particular on the 'collective action frame' concept. Drawing on examples used by SM scholars, we illustrate how these concepts can be used to extend and enrich union theory and pose new questions concerning the role of unions.*

1. Introduction

An ongoing concern in industrial relations (IR) research has been the question of how unions attract members, elicit their commitment and mobilize support for their causes (Kelly 1998). These debates have gained renewed vigour as unions around the world have struggled to retain influence in the workplace or resonate with many workers (e.g. Frege and Kelly 2004). This line of inquiry has been driven by a number of concerns, notably the question of how unions can 'revitalize' themselves in an increasingly hostile environment (Turner 2005). IR scholars have increasingly turned to social movement (SM) theory to provide a framework for understanding the processes through which unions create, legitimize and sustain collective action (Heery 2005).

Much of this work is widely attributed to the influence of John Kelly's *Rethinking Industrial Relations* (1998) in which he advocates using 'mobilization theory' (MT) to understand how individual workers develop a sense of injustice at work, identify a collective interest and take collective action in

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response to perceived injustices (also see Kelly 1997; Kelly and Kelly 1994). Although some doubts remain about some aspects of Kelly's contribution (Martin 1999), or his prognosis for union renewal (Hickey *et al.* 2010), his conceptual framework has proved highly influential. Heery (2005) has, for example, observed that this re-orientation has worked to 're-invigorate the radical wing of industrial relations scholarship' (p. 4).

While the use of SM theory has been productive, our starting point is the observation that a number of conceptual issues remain unresolved. While some researchers have made valuable contributions to redressing these issues (e.g. Heery and Conley 2007), we suggest that the framing perspective in SM theory can be deployed more systematically in ways that advance our thinking about SMs and union theory — see Frege and Kelly (2003) for a similar view.

In order to develop this argument, Section 2 commences with an examination of the influence of SM ideas in IR research. Given the centrality of Kelly's contribution, this section focuses on his use of SM theory, and identifies where his approach can be extended using the theory of collective action framing. Before exploring how this concept might be usefully applied in union research, Section 3 provides an overview of the major theoretical perspectives utilized by SM researchers: resource mobilization theory, political opportunity theory and cultural-cognitive perspectives. Then in Section 4 we focus on work that has explored different facets of 'framing' and 'collective action frames' (CAFs), and illustrate from the voluminous SM research how these concepts can be employed to extend union theory. The framing concept plays a central — albeit contested — role in contemporary theories of SMs (Tarrow 1998). As it turns out, it is also one of the concepts most regularly borrowed from SM theory by IR researchers and, therefore, warrants specific attention. Section 5 then brings the strands of our analysis together, highlighting ways in which a more systematic deployment of framing theory can be used to extend the analysis and understanding of union phenomena. Section 6 concludes.

2. SM theory and IRs

Given a number of common concerns within IR and SM research (Kelly 1998: 24), the growing interest in SM theory among IR scholars presents no surprise. What *is* perhaps surprising, however, is that this cross-pollination of ideas has not occurred in the decades preceding Kelly's contribution. SM research has long been a central topic within political science and sociology, and experienced a 'golden period' of growth during the 1970s and 1980s that has resulted in a rich and theoretically informed body of work (della Porta and Diani 2006). Yet, of the major surveys of union theory published between 1970 and Kelly (1998), none explicitly canvass SM theory as an explanatory framework. While some IR research published during this period cites specific SM writers — notably, Charles Tilly — few studies make specific mention of the broader corpus of SM theory at all.

There are a number of reasons for this disengagement with SM theory. One prime explanation arguably sits with the general under-theorization of IR. This observation has been consistently made over many decades (e.g. Marsden 1982). In a recent assessment of the state of the field, Kaufman (2010) suggests that: 'The record in developing a unique base of industrial relations (IR) theory, with its associated body of tools and concepts, is mixed, but on balance surely disappointing' (p. 75).

This neglect has also tended to reflect a traditional scepticism in viewing unions as pure SMs. Flanders (1970), for instance, describes the evolution of British unions from unstable 'movements of workers' into more permanent organizations with purposes centred on job regulation through collective bargaining. For him the SM dimension of unions was not their only essential characteristic. An equally hesitant assessment is made by Hyman (1989, 2001). While sharing Kelly's Marxist perspective, Hyman locates the value of viewing unions as SMs within debates around their transformational potential — particularly from the more pessimistic tradition within Marxist research (1989). He emphasizes the broader dilemma faced by unions who aspire to revitalize themselves as SM, but are also driven to consolidate themselves as bureaucratic organizations. For Hyman (2001), unions are better analysed 'in terms of a contradiction between ideals and organized interests' (p. 60). This inherent contradiction gives rise to what Fantasia and Stephan-Norris (2004) see as the non-SM character of unions, fluctuating between 'direct action and institutionalized power, between democracy and bureaucracy. . . . [U]nions restrain social combat and collective action, and thus a significant part of the labour movement can be seen as not only institutionalized, but institutionalizing' (p. 557).

More recently, however, the well-documented decline in the legitimacy of unions has raised the question of their purpose and strategies, and whether their revitalization requires them to rediscover what Flanders (1970) called their 'spirit of movement' (e.g. Turner and Hurd 2001). While late in coming, this more active interest in SM theory is generally viewed as opening new ways for conceptualizing union behaviour (Heery 2005).

While the *potential* for SM theory to inform union research appears widely accepted, it is not clear that IR scholars have engaged in any direct or systematic way with this literature. In order to assess this, we undertook an audit of major IR journals for the period from 1998 (the year Kelly's book appeared) to 2010.[1] Our aim was to identify articles which explicitly refer to SM concepts and/or research. In our review, we were particularly struck by the lack of depth in engagement with SM research (see Heery and Conley (2007) for an exception). This was evident in two ways. First, most studies have drawn on SM research in a highly selective manner — generally incorporating little beyond what might be identified as seminal articles in SM theory.[2] Second, few of the IR studies cite SM studies that specifically examined unions. Yet, this body of work is large and has made a significant contribution to the development of SM theory (and the 'framing' perspective in particular). We draw on examples of SM studies of unions in Section 4 below.

Arguably, this failure to engage more systematically with SM scholarship is problematic for the future development of union theory. We argue SM concepts need to be understood in the context of the questions and concerns within that literature. By relying on just one of a number of competing perspectives deployed within SM theory, say Tilly's (1978) framework for understanding mobilization, IR researchers may fail to account for a number of important processes that other SM perspectives seek to explain, or to address different questions. A more comprehensive engagement with SM theory promises IR researchers a better appreciation of the strengths and weaknesses of specific concepts and how they can be adapted and operationalized to understand the unique features of unions as SMs (Fantasia and Stephan-Norris 2004).

If IR scholars have not relied heavily on SM research, what then has provided the conceptual foundations for this growth in the use of SM theory in union research? Our audit of IR journals reveals that the majority of studies deploying SM theory have relied most heavily on Kelly, notably *Rethinking Industrial Relations* (1998). Of the 38 studies identified as drawing on SM theory, 23 cited Kelly (1998) at least once. Yet, as we have alluded to, Kelly's own engagement with SM theory is concerned with using it to develop a framework (Frege and Kelly 2003; Kelly 2005), rather than a comprehensive engagement with the larger body of SM literature

Kelly's Adaptation of SM Theory

Although not widely recognized in the IR literature, it is important to emphasize that Kelly (1998) draws most heavily from one of three key approaches within the SM literature — MT. For Kelly, the attraction of MT is that it 'maps very closely onto the central problems of industrial relations' (Kelly 1998: 24). MT has attained particular resonance within SM theory because of the rational choice dilemma associated with collective action (Tarrow 1998).

Drawing on Tilly (1978) and others, Kelly sets out a framework to understand how individuals develop a collective identity 'willing and able to create and sustain collective organization and engage in collective action' (p. 38). This approach, which has been discussed by other researchers (e.g. Cox *et al*. 2007; Hickey *et al*. 2010), draws together concepts to provide a basis for understanding the formation of SMs and, at the individual level, a framework 'which highlights the role of injustice, agency, identity, and attribution in shaping the ways people define their interests' (p. 38).

A key idea promoted by Kelly concerns the processes through which individuals establish a sense of collective identity, a shared view of salient grievances around which claims on employers or the state may be made, and a sense of the efficacy of enforcing them through collective action. For Kelly, the act of framing grievances as sources of injustice provides the basis for 'cognitive liberation' (McAdam 1982), and enables mobilization. Understanding these processes gives IR a foundation for theorizing and evaluating union attempts at renewal. Conceptually, it provides a new perspective on

union action and member participation. Normatively, it provides a yardstick against which unions are assessed as being democratic and member-centric or bureaucratic and/or subservient to organizational and employer interests.

While MT has enabled IR researchers to explore new questions, Gall (2000), for example, suggests that 'it is unable to offer a dynamic or dynamics by which to explain how or why workers and their organisations can move from lower to higher forms of collectivism' (p. 105). Elsewhere, Gall (2003) highlights the role of 'framing' as central to understanding these processes. Similarly, Frege and Kelly (2003) conclude that 'the social movement theory emphasis on framing processes offers an especially fruitful and innovative way of examining the mechanisms and outcomes of union activities. The interactions between structural and framing variables still need further investigation' (p. 22). Of particular importance is the need to distinguish between different framing *processes* that occur at various *levels* within a social system (see Figure 1). The importance of this in a union context is an issue we return to below in Sections 4 and 5. Before doing so, however, the use of MT needs to be contextualized within the broader corpus of SM theory.
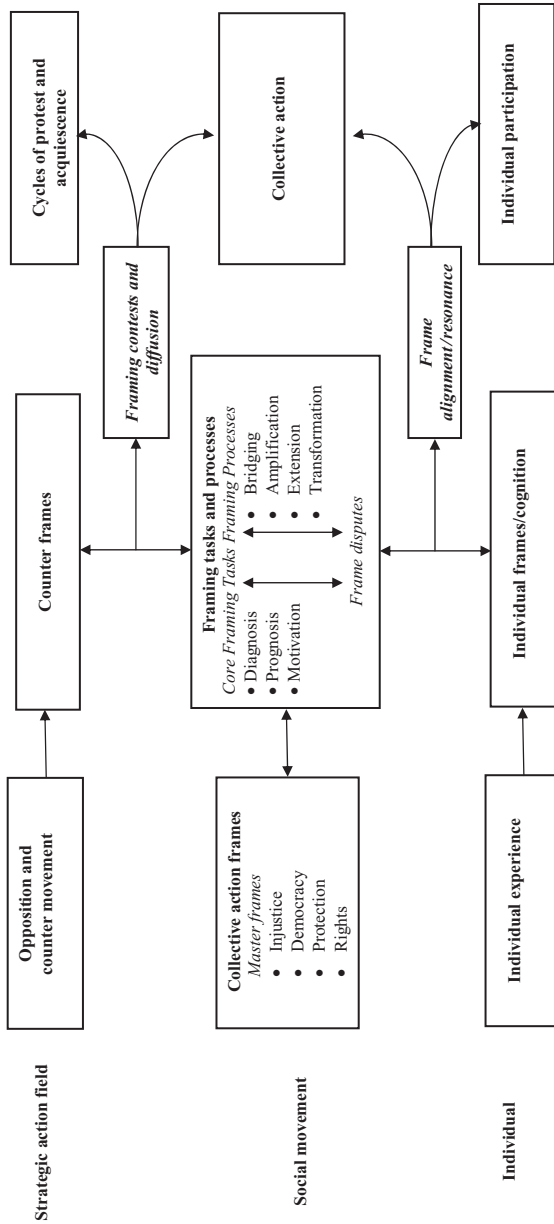
3. SM theory — an overview

In broad terms, three theoretical traditions within SM theory can be distinguished (Johnston 2011; Schaefer Caniglia and Carmin 2005): the 'resource mobilization', the 'political opportunity structures' and the 'cultural-cognitive' perspectives.

The first approach, the 'resource mobilization' theory, explicitly sought to respond to the collective action dilemma posed by rational choice theory (McCarthy and Zald 1977). While largely operating within a rational choice framework, adherents to resource mobilization theories rejected Olson's view that participation in SMs was undermined by the absence of selective benefits and marked by the 'free-rider dilemma' (McCarthy and Zald 2001). This collective action problem may be minimized through the formation of permanent social movement organizations (SMOs) that allow for the efficient mobilization of resources, thereby reducing the costs of participation for activists and, at the same time, providing intrinsic forms of selective benefits such as satisfaction derived from participation and association (Edwards and McCarthy 2004). This perspective postulated that 'social movement industries', constituted by SMOs, such as unions, and well connected 'movement entrepreneurs' (activists and leaders), were capable of mobilizing resources for the purpose of channelling and managing discontent (McCarthy and Zald 2001).

While resource mobilization theory has focused heavily on the role of internal resources and mobilization efforts, the 'political opportunities' approach emphasizes the role of political structures in shaping the potential opportunities for SMs to achieve their objectives (Tarrow 1998; Tilly 1978). Moreover, this perspective takes a critical view of the rational choice

FIGURE 1
Framing Processes — A Conceptual Map.

Strategic action field

Opposition and counter movement

Counter frames

Framing contests and diffusion

Cycles of protest and acquiescence

Social movement

Collective action frames
Master frames
- Injustice
- Democracy
- Protection
- Rights

Framing tasks and processes
Core Framing Tasks Framing Processes
- Diagnosis   • Bridging
- Prognosis   • Amplification
- Motivation   • Extension
                     • Transformation

Frame disputes

Collective action

Individual

Individual experience

Individual frames/cognition

Frame alignment/resonance

Individual participation

assumptions underpinning resource mobilization theories as they fail to provide an adequate framework for understanding 'waves' or 'cycles of contention and mobilization' (Schaefer Caniglia and Carmin 2005). For political opportunity researchers, these cycles can be explained by the presence of external opportunities and the constraints posed by suppressive acts of the state and counter mobilization by other social actors (Shorter and Tilly 1974; Tarrow 1998; Tilly 1978).

Alongside these first two perspectives, which had largely emanated from North American research, many European scholars have pursued a different analytical approach to understanding SMs. These researchers have generally rejected the structuralist and rational choice frameworks in favour of a 'culturalist' or 'identities' perspective (Kriesi 1989; Melucci 1989). This approach has been increasingly applied by scholars to interpret SM behaviour, including union movements, in both historical and contemporary context. Steinberg (1999), for example, applies what he defines as a 'dialogic approach' to understand 'repertoires of discourse' among nineteenth-century English textile workers. There are substantial differences in the arguments presented by this group of scholars; however, they share a focus on understanding the roles that SMs may play in shaping political identities and generating new conceptions of collective interests (Polletta 2006).

Notwithstanding the differences between these three perspectives and their emphasis on different questions, it is widely recognized that a degree of synthesis is emerging around the role of a number of key concepts and processes (Schaefer Caniglia and Carmin 2005; Snow and Soule 2010). This consensus reflects a recognition that particular aspects of mobilization emphasized by different theories may all play some role in explaining the overall dynamics of SMs (Tarrow 1998). This synthesis is particularly evident in the use of the concept of 'framing' to understand the ways SMOs strategically seek to construct collective identities, to recruit and mobilize activists and supporters, and the counter-framing activities of other social actors (McAdam *et al*. 2001; Snow and Soule 2010).

4. The frame concept and the process of collective action framing

Frame theory has been fundamentally shaped by a series of contributions from David Snow, Robert Benford, and their co-contributors.[3] While the concept of framing has a long sociological history (Goffman 1974), Snow *et al*. (1986) first utilize the concept of CAFs to elucidate the processes by which SMOs seek to mobilize support for their activities. They start from the premise that individuals are more likely to be mobilized where they share a strong resonance with the SMO's interpretive orientation. Their subsequent contributions identify and elaborate a number of distinct but overlapping concepts and processes that provide a framework for the study of meaning construction in SM contexts.

Figure 1 provides a conceptual map of framing processes at the individual, organizational and the 'strategic action field' levels. This figure highlights a number of key framing concepts and processes likely to shape the capacity of SM to successfully mobilize potential supporters. In this section, we start by providing a general overview of framing theory, and an outline of the concepts related to the form that frames take ('master frames'), 'core framing tasks', the role of 'frame resonance' in mobilizing collective action, including the processes through which SMOs seek to engineer 'frame alignment' with constituents, and the dynamics of 'frame contestations'. Together, these ideas have become central to contemporary accounts of SMs and their capacity to mobilize and take action in support of their claims.

The Frame Concept

For Snow and Benford (1992), a frame denotes 'an interpretative schemata that signifies and condenses the "world out there" by selectively punctuating and encoding objects, situations, events, experiences, and sequences of action in one's present or past environment' (p. 137). In this sense, frames enable individuals, groups and organizations to interpret the world around them. From the perspective of the individual, frames provide an important linking mechanism through which some problematic condition of life can be transformed from being perceived as a 'misfortune' beyond the control of the individual, to a grievance which can be acted upon. For SM theorists, this act of 'cognitive liberation' (McAdam 1982) provides the motivational impetus for individuals to engage in collective action.

At the SM level, an SMO's interpretive orientation is manifested in the CAFs it proffers in its mobilizing efforts. A CAF encapsulates an SMO's reading of a situation or event, and serves a directive function (Snow and Benford 1988). CAFs are, in this sense, 'intended to mobilize adherents and constituents, to garner bystander support, and to demobilize antagonists' (Snow and Benford 1988: 198). SMOs actively and purposively engage in the creation and development of CAFs through the process of 'framing'. Snow *et al.* (1986) reckoned that because SMOs have some capacity to determine the content of their CAFs, they are able to influence the level of support for their goals, as well as contend with competing social actors seeking to neutralize or counter their framing activities.

Master Frames

In generating frames, SMOs are constrained and aided by existing interpretive models of an overarching, generic nature. Snow and Benford (1992) introduce the concept of 'master frames' to delineate this broader interpretive schema and to place the framing activities of SMOs into a wider ideational context. These master frames 'provide the same function as movement-specific collective action frames, but they do so on a larger scale . . . master frames are generic; specific action frames are derivative' (Snow

and Benford 1992: 138). In other words, master frames can provide an interpretive template that SMOs can use in the creation of contextually specific CAFs (Snow and Benford 1992). Much like the idiosyncratic frames deployed by specific SMOs, master frames have a number of distinguishing features, including the intensity with which they are able to 'resonate' with potential adherents; the extent to which the frame attributes blame for a situation on internal or external factors; and the extent to which the frame is able to be re-interpreted across different SM contexts (Benford 1997).

Variants of what SM theory has referred to as the 'injustice frame' provide the obvious example of a master frame. For SMs, injustice has been characterized as 'the hot cognition . . . the righteous anger that puts fire in the belly and iron in the soul' (Gamson 1992a: 32). Indeed, Gamson (1992b) contends that *all* CAFs are injustice frames; or always contain an injustice component. While the injustice frame has proved ubiquitous, Benford and Snow (2000: 615) observe that there is little theoretical or empirical support for this assertion. In addition to the injustice frame, Benford (1997: 414), for example, highlights a number of alternative master frames identified by SM scholars — see Figure 1.

While IR researchers have generally assumed that 'injustice serves as the central organizing principle for mobilizing workers' (Johnson and Jarley 2004: 543), the SM research supports the contention that unions have used other master frames. For example, Babb (1996) examines the ascendancy and demise of 'greenbackism' as a frame deployed by the US labour movement during the nineteenth century. 'Greenbackers' opposed a return to the gold standard and the suspension of *specie* payments during the American civil war. Rather than being based on an injustice master frame, Babb interprets greenbackism as a derivation of the 'producerism' master frame, which emphasized the moral superiority of productive activity and espoused values such as hard work and self-employment (Babb 1996: 1043). Labour movement 'greenbackism' portrayed workers and employers as producers with common interests, and pitted these against non-producers such as banks (Babb 1996; also see McVeigh *et al*. 2004).

Core Framing Tasks

As cognitive schema, frames not only work to highlight the features of a social situation in a way that elicits a sense of grievance, but also function as modes for articulating strategy — or the action-oriented purpose of framing. Snow and Benford (1988) identify three interrelated 'core framing tasks' that an SMO performs in constructing a frame: diagnostic, prognostic, and motivational (action) framing (also see Benford and Snow 2000). Together, these serve to identify a situation as critical; provide causal attribution for the problem; and identify solutions and a rationale for the chosen course of action. For a useful, if partial, illustration of core framing tasks in a union context, see Carty (2006).

SM scholars have identified a number of different *diagnostic frames*. Whatever form they take, diagnostic frames serve to identify the source of any grievance, its causes and culpable agents. They are subject to internal conflict within and between SMOs that constitute an SM 'industry' (McCarthy and Zald 1977), and typically involves activists engaging in 'boundary framing . . . to delineate the boundaries between "good" and "evil" and construct movement protagonists and antagonists' (Benford and Snow 2000: 616).

In contrast, the role of *prognostic framing* is to advance a solution to the problem, as well as to identify the strategies necessary to implement it. Diagnostic and prognostic framing have generally been found to be closely coupled as the set of feasible actions taken in support of claims is constrained by the diagnostic frame (Benford and Snow 2000). Again, these processes are likely to be contested, particularly in a strategic action field where there are multiple SMOs vying for support, opponents engaging in their own 'counter-framing' tasks, or where media and public opinion play a critical role in shaping the credibility of an SMO's position (Benford 1993b).

The purpose of the third core framing task — *motivational (or action) framing* — is to provide likely SM adherents with a rationale for participation in its activities. In other words, while diagnostic and prognostic framing aim to generate consensus with an SMO's interpretation of specific situations, motivational framing seeks to translate this into individual-level participation through socially constructed 'vocabularies of motive', which are used to provide a compelling account for engaging and sustaining participation.[4]

Frame Alignment Processes

For Snow *et al.* (1986), an SMO's ability to achieve a 'fit' between its interpretive orientation and that of potential members depends on the substance and appeal of its CAF. They posit that this interpretive fit is achieved through one of four 'frame alignment processes': bridging, amplification, extension, and frame transformation.

Snow *et al.* (1986) identify *frame bridging* as 'the primary form of frame alignment' (p. 468), which involves an SMO building connections between two distinct but ideologically congruent CAFs. Bridging may occur at both the organizational or individual levels. At the organizational level, two or more SMOs may locate ways to connect their respective agenda through an alignment of goals and values that define them as SMs. At the individual level, SMOs typically seek to articulate their own agenda in a way that resonates with a 'sentiment pool' consisting of individuals who hold congruent, but latent, views (Benford and Snow 2000: 624). One way bridging has been used by SM researchers is to examine how SMs create and sustain alliances. For example, it proved central to the capacity of environmental groups to develop an alliance with the International Union of Painters and Allied Trades for the improvement of environmental health in Boston public schools (Senier *et al.* 2007). The alliance's achievements were attributed to

the environmentalists' success in framing environmental issues as occupational health and safety matters, thereby incorporating the concerns of both environmentalists and unions.

Frame amplification involves the clarification and invigoration of values or beliefs presumed basic to prospective constituents (Snow *et al.* 1986: 469). Here, the SMO aims to construct a frame that emphasizes values that are already salient to the target audience (say, union members), but which for a variety of reasons have not yet translated into collective action (Snow *et al.* 1986: 469). SM research has illustrated the relevance of frame amplification to the study of labour movements. Voss (1996), for example, utilizes the concept of frame amplification in her work examining factors associated with the rise and subsequent collapse of the Knights of Labour (KOL). Voss attributes the KOL's initial rapid expansion to the flexibility of its organizational forms and tactics, as well as the effectiveness of its CAF. Notably, the KOL was able to develop a frame which amplified and extended both familiar Republican themes and traditional labour ideology. It comprised 'a set of beliefs that gave workers the mission of rescuing the nation, while suggesting that they would be able to accomplish this enormous task by organizing thoroughly, and demonstrating their moral and numerical power' (p. 252). This enabled the KOL to generate support from workers and small employers. Notwithstanding this initial success, Voss documents the pivotal role played by the counter-framing efforts of employers' associations in the KOL's subsequent demise. In particular, she argues that the KOL's frame lacked a 'fortifying myth', which allowed activists to accept defeats and to sustain a belief in the efficacy of the movement until new political opportunities emerged (p. 253). Ultimately, this gave rise to internal conflict and eventually led to the collapse of the KOL (also see Hallgrímsdóttir 2006).

While the need to overcome 'ambiguity and uncertainty or indifference and lethargy' provides a core rationale for eliciting mobilization through frame amplification, SMOs may also need to engage with potential supporters who do not readily identify with existing 'sentiment or adherent pools' from which they draw support (Snow *et al.* 1986: 472). These situations require SMOs to find ways to extend their support base and encompass interests or values incidental or secondary to their primary cause (Benford and Snow 2000). *Frame extension* involves an SMO drawing connections between its own primary interests and values and those of other groups by framing them as mutually compatible (Benford and Snow 2000). Although the potential for frame extension may be contingent on the 'plasticity' of a master frame, Benford and Snow found it to be a common tactic across different types of SMOs, including unions. The SM literature provides numerous examples of unions seeking to extend support for their causes beyond their current membership. Cornfield and Fletcher (1998), for example, view the historical evolution of the American Federation of Labor (AFL)'s legislative agenda between 1881 and 1955 as 'an instance of long-term, gradual frame extension' (pp. 1308–09). They find that the AFL sought to expand its traditional

concerns with legitimizing trade unionism and imposing limits on labour market competition across a wider range of policy domains, notably by increasing its calls for general improvements in social welfare and labour market regulation (pp. 1308–9). An adverse change in market conditions as well as an improved, political opportunity structure, prompted the AFL to extend its frame to also encompass the interests of non-union workers.

Snow *et al.* (1986) observe that SMOs may face the dilemma of effecting a fundamental change in their interpretive orientation in order to find resonance with existing or new audiences. When this is the case, new values may have to be planted and nurtured, old meanings or understandings jettisoned and erroneous beliefs or 'misframings' transformed (Snow *et al.* 1986: 473). More than a decade ago, Benford and Snow (2000: 625) observed that few studies have explicitly examined *frame transformation*. Yet, the ongoing perception of unions as irrelevant or alien to contemporary worker identities, particularly among young workers (Lowe and Rastin 2000), would suggest that this concept should be of particular relevance for researchers interested in applying SM concepts to unions. Indeed, one of the few existing examples in the SM theory literature that examines frame transformation is provided by Beckwith's (2001) research on the strategy of the United Mine Workers of America (UMWA), which utilized non-violent civil disobedience instead of its traditional repertoire of pickets and strike action to advance its claims. The UMWA's ability to introduce innovative strike tactics was inextricably linked to its capacity to generate a CAF that transformed the miners' interpretive conceptions of their masculinity. The transformation in UMWA tactics was based on the use of a gendered frame, which 'recognized the masculinities that underpinned (and were validated by) violent strike behaviour, and recast them as foundational for passive resistance' (p. 312).

Frame Resonance

As studies have shown, framing efforts may be subject to strategic misjudgment (Youngman 2003). Snow and Benford (1988) use the concept of 'frame resonance' to explain variations in the effectiveness of different frames. Frames that 'resonate' strongly are posited to facilitate an SMO's efforts at achieving its mobilization goals, and *vice versa*. Thus, the concept of frame resonance serves as a measure of an SMO's ability to develop a CAF that achieves 'frame alignment' and facilitate mobilization. Benford and Snow (2000) identify two qualities of CAFs that shape its resonance: credibility and salience. The credibility of any frame is a function of its consistency, empirical credibility and the credibility of the frame articulators, while salience is the result of its centrality, experiential commensurability and narrative fidelity (see Benford and Snow 2000).

These concepts have been used by SM researchers to explore aspects of framing across a range of different contexts, including unions. Reese and Newcombe (2003), for example, draw on the concept of frame resonance

to compare the frames deployed by three different US welfare rights organizations to mobilize welfare recipients. They observed that while some of these organizations framed welfare rights as consumption rights, others more successfully framed them as workers' rights, which in turn facilitated the development of alliances with unions.

Contested Processes

Snow and Benford (2000) also identify a number of 'contested processes' likely to influence framing activities. They note that CAFs may be subject to challenges from within an SM ('frame disputes'), as well as externally by its opponents or critics ('framing contests'), which result in their modification or replacement.

Disputes over the substance of a frame may arise within the confines of a single SMO and between separate organizations belonging to the same movement (Benford 1993b). In the SM literature, Clemens (1996) analyses the tensions between the AFL, and state and local union bodies in the late eighteenth and early nineteenth century as an example of a frame dispute. While the AFL was committed to craft-based organizing, local union bodies advocated a broader political mobilization of workers, with each approach associated with a different organizational model (Clemens 1996: 206–7). One frame, in essence political, was pitted against another, principally economic in nature (p. 221).

Externally, SMOs compete with other social actors in 'framing contests' in which each of the antagonists promotes their CAF as the most compelling ideational interpretation (Benford and Snow 2000). These 'counter-frames' are designed 'to undermine, rebut or otherwise neutralize the movement's claims, myths, collective identity and interpretive framework' (Benford 1997: 418). In order to neutralize a counter-frame, the challenged party seeks to 'reframe' or displace it as the dominant way of 'seeing'. In this way, frames change and develop in the ongoing interaction between SMs and their opponents.

The contested and evolving nature of frames raises the question of how effectively they contribute towards the achievement of an SMO's mobilization goals over time. This is of particular importance to the study of union strategic choices, and may provide an explanation for why some attempts at revitalization fail or are ineffective. Within the SM literature, Haydu (1999), for example, examined the counter-framing activity of US employers in response to labour unrest in the late nineteenth century. He identified three dominant anti-union frames (unions as illegitimate; the rights of private property; and unions as 'un-American'), and explains why employers chose these from a broader repertoire of available counter-frames to undermine the legitimacy of unions. He found that employers constructed anti-union campaigns by drawing on frames that had been used in other spheres of social activity. Haydu (1999) concludes that employers' interaction across these different social domains is central to explaining the qualitative nature

of the anti-union frames prevalent in late nineteenth-century US labour conflict.

5. Extending the engagement with SM theory

Our discussion thus far confirms Kelly's (1998) assessment that the concerns of SM theory closely parallel those of IR scholars. However, as we show in Section 2, this aim has been impeded by an incomplete and, at times, superficial use of SM theory by IR researchers, notably the absence of a clearly articulated attempt to explore the *processes* of framing and mobilization at different *levels* within a social system (i.e., the individual, SM and social action field levels). This not only provides a conceptual means to theorize the 'interactions between structural and framing variables' (Frege and Kelly 2003: 22), but also compliments Kelly's own approach to understanding mobilization processes.

As we noted in Section 2, Kelly is primarily concerned with cognitive liberation at the individual level. Recognition of the interconnectedness of these multiple-level processes is central to understanding the role of framing in mobilizing supporters and generating collective action. In this section, we seek to build on our analysis by illustrating a number of ways that SM theory can be deployed to explore questions central to contemporary debates over the role and future of unions. In doing so, we aim to show how union theory can be enhanced. The focus of this discussion maps closely to the three levels at which framing concepts have been deployed in SM theory — see Figure 1.

Strategic Action Fields: Framing Processes in Dynamic Environments

A major debate within IR has concerned the role of member activism in promoting union renewal. While some researchers highlight the relationship between strategic choices and union effectiveness, others have emphasized the role of member participation — or a union's capacity to operate more like an SM — as a necessary condition for unions to do so. This view has been subject to critical evaluation by Hickey *et al.* (2010), who present a secondary analysis of 32 case studies examining factors associated with union renewal. Among other things, they concluded that 'unions adapt their campaign strategies and methods of organizing to the particular circumstances in which they find themselves. Accordingly, the same union in two contexts may use different means to achieve the same ends' (p. 75).

This observation would come as no surprise to SM researchers examining SMOs operating in diverse contexts. For example, Section 2 noted that a key strand within SM research has focused on the ways in which broader contextual factors, typically conceptualized as 'political opportunity structures', shape the tactics and trajectories of SMOs. In particular, studies of different SMOs (including unions) have highlighted the importance of context in understanding how and why framing tactics succeed or fail (e.g. Cornfield and Fletcher 1998; Youngman 2003). This work raises a number of critical

questions for the study of unions, some of which have already been recognized within the IR research.

While Hickey *et al.*'s (2010) challenge to the role of mobilization in union renewal is a critical one, the question of how best to conceptualize (and operationalize) the contexts in which unions function is equally important. Indeed, Kelly (2011) recently notes that 'perhaps one of the major challenges . . . is to think through how we can specify more precisely the conditions under which each of the sets of "variables" [markets, institutions and actor strategic choices] is more or less effective' (p. 71). SM theory provides a useful conceptual apparatus to examine the relative importance of market and institutional features defining a union's environment, the scope for unions to employ different 'repertoires of action', and the likely resonance of CAFs (Johnston 2011; Snow and Soule 2010).

A promising starting point for addressing the challenge identified by Kelly is the theory of 'strategic action fields' — defined by Fligstein and McAdam (2011) as 'socially constructed arenas within which actors with varying resource endowments vie for advantage', (p. 3) — also see Fligstein (2001). From this perspective, SMs are not conceived of engaging in collective action framing in isolation, but typically do so within a 'strategic action field' where they seek to influence the behaviour of others, compete for allegiance and mobilize adherents. This perspective, for example, highlights the role of framing as a contested process. These contestations may have a significant impact on the resonance of any attempt to project a CAF conducive to mobilizing workers in any given context. For example, Beckwith's (2001) study of the UMWA's Pittston dispute discussed earlier, illustrates how frame disputes can constrain and extend a union's feasible set of industrial tactics. External contestations may also be transformative. Following the introduction of the highly controversial *Work Choices* legislation, Australian unions embarked on a major campaign prior to the 2007 federal election. Called *Your Rights at Work*, this campaign faced major opposition from employers and other political lobby groups, who sought to counter-frame the debate by focusing on potential threats that unions and worker protection posed to economic prosperity (Muir and Peetz 2010). Like the Pittston miners' strike, this took place in the context of a larger shift in union strategies. In this case, it involved unions deploying a centralized media campaign to elicit support from non-unionist as well as union members. Muir (2008) concludes that the *Your Rights at Work* campaign 'was a quantum leap for the trade union movement in reconnecting the debates about work to the debates about contemporary Australian life' (p. 185).

The notion of frame contestation also provides considerable scope for exploring the dynamics of union strategic actions, and has important implications for research design. In our view, these dynamics suggest that any examination of framing needs to be conducted in the broader context of frame contests involving other social actors, as well as over more extended periods of time. This should provide opportunities to capture the contestation and evolution of framing activities.

Constructing Union Identities: Framing as Strategic Capability

Hyman (2001) provides an influential account of how different national union movements in Europe have construed their strategic orientations around three broad identities: as labour market actors (market), as a vehicle for social integration (society) or as anti-capitalist opposition (class). He suggests that many national movements have, more recently, 'suffered intense ideological disorientation' (p. 173), which has been precipitated by the inevitable limitations of national union 'logics' in an increasing transnational environment. Part of this challenge, he asserts has been 'an erosion of credible rhetorics, of visions of a better future, of utopias. Building collective solidarity is in part a question of organizational capacity, but just as fundamentally it is part of a battle of ideas. . . . Unions have to recapture the ideological initiative' (p. 173).

Hyman's proposition has obvious links with our concern for understanding framing processes, particularly at the SM level. As the notion of framing implies, unions are not simply subjects of their external environment, but conceptualized as capable of exercising some agency within constraints, however severe they may be. This question of how unions exercise agency in a hostile environment has been a major theme in debates about revitalization and union strategy.

In this context, the framing perspective is useful in conceptualizing and investigating union efforts to redefine their collective purpose and identities. How to conceptualize the role that SMs play in constructing 'social reality' has been a key concern within SM theory. As the SM research also makes clear, these processes are both dynamic in nature and subject to contestation as SMs seek to transform or displace old frames, or take on new ones that resonate (see, e.g., Beckwith 2001). It will be recalled that these processes reflect what SM research has conceived of frame disputes within SMs, as well as efforts by SM to legitimize their repertoires of action. Analytically, this has been closely tied to the capability (or 'social skill') of social actors (such as unions) to develop and deploy CAFs which enable 'strategic actions' directed towards securing influence and control within a strategic action field (Fligstein and McAdam 2011).

While some attempt has been made by IR scholars to examine different types of 'resources' and 'capabilities' used by unions to pursue their objectives (e.g. Frost 2000; Levesque and Murray 2002), these have remained largely under-theorized (Gahan and Pekarek 2006). Our illustrative examples of SM research on unions highlight framing as one critical element in a union's set of available resources and capabilities (Pekarek 2008) and, by extension, point to its role in shaping the legitimacy and effectiveness of different 'repertoires of action' available to unions (McAdam 1996). Frame theory would, for instance, help explain how CAFs shape a union's access to different resources and capabilities and, over time, it's feasible set of strategic actions (Ganz 2000).

The widely debated example of 'union–management partnerships' provides an interesting case for exploring these issues in a union context. As a

number of IR scholars have documented, from the 1980s, many unions in the United Kingdom and elsewhere established 'partnership agreements' as a means to establish more co-operative relationships with employers (e.g. Oxenbridge and Brown 2002). In these cases, the idea of 'partnership' provided an ideological foundation for many unions to pursue non-militant tactics, typically in response to firm restructuring, to secure union recognition, or after periods of prolonged industrial conflict (Heery 2002). At the same time, however, in some instances, the pursuit of partnership met resistance from within unions among organizers and activists, as well as rank-and-file members (see Heery 2002). While this phenomena has been documented, there has been little work which explores the conditions and internal processes under which these frame disputes have played out. Similar observations can be made about debates and internal contests around alternative strategies for union renewal, notably the merits of 'social movement unionism' as a means to do so (Hickey *et al.* 2010).

Framing at the Individual Level: Networks and Frame Resonance

As our discussion makes clear, framing serves to highlight the role of ideological disposition and psychological orientation in influencing potential members' attitudes towards an SM. While Kelly has highlighted the role of leadership in creating a sense of injustice and a belief in collective action, SM scholars have established that other structural and social features of a situation are also likely to be conducive to mobilization (Snow and Soule 2010). In this context, the analysis of networks between individuals and among SMOs (and other social actors) has grown substantially. This work highlights, for example, the consequences of 'network ties', which are often embedded in specific community and organizational contexts, for individual propensity to participate in movement activities, the diffusion of new repertoires of action across movements and national boundaries (Soule 2004), as well as the capacity for different types of social network relations to tap support from potentially disconnected (but sympathetic) 'sentiment pools' (Baldassari and Diani 2007; Snow and Soule 2010).

The potential application of the concept of social networks and related analytical techniques to the analysis of unions should be obvious (see Dixon and Roscigno 2003). Most apparent is the challenge of mobilizing an increasingly fragmented pool of potential union members, whose social identity is mediated through a range of social values and identities beyond those traditionally associated with work and unionism (Fantasia 1988; Gomez *et al.* 2002). Network analysis applied to understand unions could, for example, shed considerable light on patterns of identities, affiliations and social values that represent different paths towards, or away from, joining and participating in unions; expectations held by different cohorts of members; or the types of exchange relation (social or transactional) that members seek to establish through joining and participating (see Goldberg 2011).

6. Conclusion

Kelly's *Rethinking Industrial Relations* marks a milestone in the development of union theory. Its major contribution has been to suggest the potential of SM theory in informing union research. Testament to this impact is the growing body of research deploying MT. However, little advancement has been made in extending this framework or drawing more widely on SM ideas since the publication of Kelly's book. This has continued to be the case despite the fact that a number of scholars, including Kelly, have highlighted the potential to do so.

Our main aim in this article was to redress this gap, and demonstrate how a broader engagement with SM theory can usefully extend and enrich IR scholarship generally and union theory specifically. We highlighted the different theoretical traditions in SM theory, paying particular attention to the 'framing' perspective, and sought to provide an overview of key concepts which should enable a deeper engagement with SM theory.

Finally, we provided a sense of how these can be used by IR researchers, focusing on a number of SM ideas that could be applied to understand contemporary union phenomena. These illustrations were intended to be suggestive rather than exhaustive. Our point was to show that a more comprehensive and systematic engagement with SM theory will provide a stronger theoretical foundation to extend existing theories of unionism. Ultimately, a better understanding of SM theory is needed to paint a more complete and accurate picture of the success — or otherwise — of union efforts to revitalize and maintain a role in the contemporary workplace.

Notes

1. The following journals were audited: *British Journal of Industrial Relations*, *European Journal of Industrial Relations*, *Industrial and Labor Relations Review*, *Industrial Relations*, *Industrial Relations Journal*, *Industrial Relations/Relations Industrielles* and *Journal of Industrial Relations*. We reviewed abstracts of all published articles to identify those drawing on SM concepts (such as: CAF, mobilization, political opportunity structure). Where there was some doubt as to whether

an article fell within this category, both researchers reviewed the article and a consensus was reached on whether it should be included. Each selected article was reviewed and all citations of SM research were identified. Over the entire 12-year span that we audited journals, 38 articles were found to have cited identifiable SM literature — each on average citing 4.1 SM sources.

2. Our audit found a total of 105 SM studies cited 157 times. A small number of citations dominated: 24 of all SM theory sources were cited by 2 or more articles published in the audited journals. Among these 24 studies, 2 — Voss and Sherman (2000) and Tilly (1978) — received the most attention, each cited 9 times.

3. Key concepts were developed in Snow *et al.* (1986). Also see: Benford (1993a, 1993b, 1997), Benford and Hunt (1992), Benford and Snow (2000), Snow (2004), Snow and Benford (1988, 1992, 2000).

4. This aspect of 'micro-mobilization' has remained under-examined, even within the SM literature.

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