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ORIGINAL ARTICLE

In the interest of everyone? Support for social movement unionism among union officials in Quebec (Canada)

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Abstract

Using a mixed-method research design involving interviews and a survey, we examined how union officials in Quebec perceive social movement unionism (SMU). We show that union officials view SMU as a multifaceted phenomenon with ideal and pragmatic dimensions. They are torn between strong support for the ideals of SMU and a practical reluctance to use members' dues to provide services to non-members. Experience with civil society organisations mitigates this tension, encouraging union officials to defend the interests of everyone not only as an ideal, but also as a strategy that allows unions to protect members and unrepresented workers.

1 | WITHIN AND BEYOND UNIONS: INTRODUCTION

Over the last 50 years, trade unions (TUs) have experienced decreasing density and organisational ossification leading to an inability to exert a positive influence on working conditions for their members (Baccaro & Howell, 2017). They have done even less well for unrepresented workers. Embracing the traits of a social movement has been suggested as a potential way to offset this decline (Ibsen & Tapia, 2017; Waterman, 1993). A transition to 'social movement unionism' (SMU) rests on two dynamics. *Internally*, union leaders must mobilise members, shifting them from 'chequebook membership' to active participation. Persistent low activism among members has thwarted the efforts of union leaders along this

dimension (Fiorito et al., 2015). *Externally*, the 'bounded horizon' of workplace and dues-paying members has to be broadened to represent the interests of all workers, regardless of their membership status (Turner & Hurd, 2001). TU efforts in this direction have included increasing activities and visibility in the social sphere, forming alliances with civil society organisations (CSOs), and being at the forefront of labour rights movements with significant impact (Holgate, 2015; Tapia, 2019). Support of union leaders for transforming their organisations into a social movement cannot, however, be taken for granted. Oligarchic and conservative resistance on the part of some leaders poses an obstacle (Aronowitz, 2015; Michels, 1911; Turner & Hurd, 2001). Our research aims to contribute to this second, potentially more viable, dimension of SMU, by exploring the following questions: What do union leaders think of the idea of moving their unions from exclusively representing members' interests to being part of a social movement? To what extent and why do they support different aspects of SMU?

Our analytical perspective is decidedly different from the prevalent one in SMU debates and research. The latter has been organisational (macro or meso) with an *outwardly* oriented point of view that examines union actions *towards* civil society, seen as an external environment to which TUs must become linked and upon which they must act (Nissen, 2004). We, instead, examine SMU *inwardly,* focusing on the support it garners within unions, and the backing it gets from the *individual* (micro) point of view of union officials.

We employed an empirical research design consisting of two sequential stages. First, we investigated how union officials perceive the move towards SMU. Insofar as SMU has not been examined from an *individual inwardly* pointing perspective, we did not impose a specific conceptualisation in our semi-structured interviews with union leaders. This afforded us an explorative yet extensive view of how TU officials think of SMU. These conversations provided insights into the understandings that union leaders have of SMU, the implications they see for TUs' opening-up to society, and suggested useful analytical dimensions to pursue. They also shed light on some idiosyncratic motives that union officials have for supporting this approach. Second, we sought to understand how and why support for specific dimensions of SMU varies among union officials. A systematic analysis of the drivers of support for SMU required adopting a less subjective point of view. Actors themselves are often unable to transcend their own thinking to arrive at an understanding of the reasons that lead them to have certain ideas (e.g., Bourdieu, 1994). A quantitative approach is more suitable for evaluating the importance of the factors underlying SMU and to uncover potential links among them. Therefore, we used the results of the interview phase to design a questionnaire as the second empirical stage in the research design. This survey allowed us to capture variation in support for various dimensions of SMU and to investigate factors that can explain that support.

The research on which we report focused on gaining a better understanding of the *micro-foundations* of SMU. We recognise that this mixed-method approach and focus on Quebec limits the generalisability of our findings. Nonetheless, the insights we provide can be incorporated into and elaborated by future research in examining the micro-level mechanisms of SMU. *Analytically,* we show that the conception of SMU within unions is multidimensional and exhibits an underlying tension between pragmatic and ideal dimensions. Ideal dimensions are supported widely, while pragmatic ones seem to be sustained only by those who have external experiences in civil society. *Theoretically,* we extend the experience-good model to understand how union leaders conceive SMU (Gomez & Gunderson, 2004). We have expanded and qualified the experience-good model to

differentiate types of experiences *internal* to unions (having executive responsibilities or not) and to consider *external* experiences (involvement in CSOs, the influence of kinship) that can change the interpretation of union goals. *Strategically* our results have implications for *union policies* for planning an effective transition to SMU.

In Section 2, we elaborate the framework that informs the nature and possible correlates of support for SMU. Section 3 describes the mixed-method research design and presents the results of the in-depth qualitative interviews. These initial findings were used to design a questionnaire for collecting quantitative data that, in Section 4, we explore via a series of regression models. Section 5 discusses the main findings of our research efforts. Finally, we present the main limitations and future research implications of our paper in Section 6.

2 | ROOTS AND RAMIFICATIONS OF SMU: THEORETICAL FRAMEWORK

Recent debates about SMU have their roots in the weakening of TUs, in part a result of the tertiarisation and flexibilisation of the labour market (Baccaro & Howell, 2017). In the post-World War II 'golden age', most industrial workers took unions and collective bargaining for granted. Declining union density thereafter, however, created an ever increasing divide between privileged, represented insiders and precarious, non-represented outsiders (Fletcher & Gapasin, 2008; Kalleberg, 2009). Confronted with decreasing legitimacy as bargaining partners, shrinking membership, and diminishing organising resources, many unions focused their efforts exclusively on the well-being of dwindling dues-paying members (Rueda, 2008). Having lost the capacity to defend directly and effectively the rapidly expanding precarious labour force (Keune, 2015), some unions chose to act in favour of contingent employees indirectly via the political arena—lobbying for general improvements in workers' rights and increasing their visibility in the public sphere (Baccaro et al., 2003; Rolf, 2016). On the one hand, TUs face enormous pressure to use their resources conservatively, protecting members' interests through collective bargaining and other services. On the other hand, sharply segmented labour markets bring to the fore an ideal dimension of unionism, with the aspirational goal of defending all workers. Some union members, especially leaders, favour going beyond the service model to implementing policies that benefit all workers (Ahlquist & Levi, 2013; Mosimann & Pontusson, 2017).

Within these contradictory forces, SMU emerged as a radical organising tool to 'reform, rebuild, and revitalise' unions. It represents a shift away from the organisational ossification and isolation inherent in conservative 'services for members only' practices. SMU injects a 'passion for social justice' that transcends narrow self-interest (Turner & Hurd, 2001; pp. 13–15). SMU has moved from a scholarly debate into the manifestos and charters of many unions. SMU's goals involve all workers—unionised or not, organisable or not—and proposes union control over the labour process (Ibsen & Tapia, 2017; Waterman, 1993). Two strategies have emerged to pursue these goals. The first involves renewing unions from the inside by enhancing and extending rank-and-file activism in a more democratic union structure. The second attempts to reinvigorate unions by opening them up to the external environment, placing society-at-large labour issues on policy agendas, and building coalitions with grassroots social justice groups (Clawson, 2003; Turner & Hurd, 2001; Waterman, 1993).

The lynchpin for union renewal is internal re-organisation: reduce bureaucracy, limit top-down functioning, promote bottom-up involvement of members, encourage shop-floor activism, and use innovative techniques to empower the base (Però, 2020). Similar to the experiences of other secondary associations, however, shrinking membership has instead encouraged conservative forces to push most North American unions to favour oligarchic techniques for survival (Michels, 1911; Turner & Hurd, 2001). Bottom-up, democratic forces remain suffocated by the bureaucratic and conservative tendencies of business unionism, characterised by a large professional staff, an oligarchic leadership distant from rank-and-file members, and a preference for conservative actions to 'save' the organisation and ensure that current leaders remain in control (Voss & Sherman, 2000). In this context, union internal actions represent members' interests narrowly, focusing on collective bargaining and routine administration (Turner & Hurd, 2001). Such conservatism in structure and function has drained unions of grassroots power and rank-and-file activism (Fiorito et al., 2015). It has also made them defenceless vis-à-vis large-scale economic transformations and strategic assaults by employers (Logan, 2006). In theory, bottom-up involvement can advance the goals of SMU from within; in fact, the effectiveness of this strategy is severely hindered by conservative forces.

An outward looking, external strategy for developing a viable SMU also exists. This entails going beyond 'bread-and-butter' issues and opening the borders of union constituency to society as a whole to influence the way societal resources are shared among all workers, insiders and outsiders, unionised and non-unionised (Heery, 2005; Turner & Hurd, 2001). From this perspective, union organising has to go beyond being 'deep inside' the workplace and 'shallow outside' of it (Holgate, 2018); it has to mobilise large-scale external support for campaigns linked to social justice beyond workplace issues, such as in the case of the collaboration with LGBT, citizens', and student movements (Heery, 2018). This implies a shift in union organising from being centred on employer-employee relationships in the workplace, to including stakeholders outside of it (Rizzo & Atzeni, 2020).

By moving towards SMU and creating alliances with civil society and community organisations, unions can expand their impact (Aronowitz, 2015; Clawson, 2003; Engeman, 2015). Kelly's (1998) 'fusion' approach underscores that unions have to find common ground with the identities and agendas carried by CSOs and new social movements. Under certain circumstances, unions and CSOs are 'natural allies', part of the same network of organisations, entertaining mutually advantageous links, and with some union leaders having activist experiences in CSOs (Heery et al., 2012; Kelly, 1998). Coalitions extend the locus of union organising from the workplace and its narrow economic interest to local communities and society at large (Frege & Kelly, 2004; Holgate, 2018). Moreover, in their relationships with CSOs, TUs are exposed to new ideas and learn innovative mobilisation practices (Heery, 2005). Unions also gain access to alternative resources that have the potential to make their associational influence capable of delivering a more potent impact (Wright, 2000).

Adopting the organising strategies of a social movement blurs the contours between unions and society (Heery, 2018). The institutional divide between members and non-members wanes by expanding the union base to ordinary people (Mcalevey, 2016). The goal is to integrate the unorganised (Holgate et al., 2012), the 'unorganisable' (Waterman, 1993), and social justice activist citizens by weaving SMU into the fabric of societal daily life (Però, 2020). To the extent that unions abandon the fragmented, yet exclusive, identities of their membership, they

promote a more flexible, inclusive, and organic form of solidarity (Hyman, 1999). Unions can thus mobilise stronger associational power with different societal actors to defend, promote, and enhance effectively the labour rights of oppressed workers (Doellgast et al., 2018).

Shrinking densities pinion TUs between centripetal forces that push them *inward* to focusing exclusively on themselves and centrifugal forces that drive them *outward* to opening up to societal relationships as partners in a social movement. Given their organisational roles, union leaders become centres of resonance, connecting and amplifying these dynamics (Voss & Sherman, 2000). Their associational experiences assist union leaders in making sense of these forces. It is useful to highlight two frameworks in this regard: the 'experience-good' model of union membership (Gomez & Gunderson, 2004) and research on civil society (Putnam, 2000). The *experience-good* model focuses on traditional workplace unionism, highlighting how *internal* direct experience with unions explains the support they receive from rank-and-file members. Employees embrace the values of unions once they experience the benefits of being a member. 'Experience good' also considers the possible influences of some *external* indirect experiences, such as realising the value of unions within a kinship network. This model highlights how internal and external experiences become forces that explain why workers embrace traditional workplace unionism. An expanded experience-good model might explain why union leaders might embrace SMU. First, union *internal* experiences must be differentiated. Not all roles within unions convey similar experiences. Consider the divide between union leaders and the rank-and-file. The latter mostly experience union 'bread-and-butter' discourse and actions aimed at promoting their workplace interests. Possible union actions to defend wider interests may trigger fear of having to share 'union goods' and losing their relatively privileged position with respect to non-members (Tapia, 2013). On the one hand, this represents a plausible explanation for why union leaders may follow conservative internal, servicing practices and dismiss SMU a priori (Newton & Shore, 1992; Turner & Hurd, 2001). On the other hand, union leaders are more exposed to debates about transitioning to SMU than are regular members (Rose, 2000). High-rank union officials have debated SMU issues, often expressing concern for workers and issues beyond those of their own organisations and members (Tattersall, 2005). Many union leaders have developed union activities in collaboration with CSOs aimed at improving the working conditions of non-unionised, low-wage, oppressed workers (Tattersall, 2009).

Second, consider the *external* experiences of union leaders. The crisis in union membership has spurred the emergence of new union leaders who leverage their activist experience outside the labour movement and endorse the transformation to SMU (Voss & Sherman, 2000). Going beyond kinship relationships, these *external* experiences allow union leaders to appreciate more fully the possible societal level impact that SMU can have on labour conditions.

The literature on civil society highlights that associational experiences have strong effects on political efficacy, civic values, and the development of a sense of solidarity with society that goes beyond narrow personal or organisational interests (Putnam, 2000). Involvement in CSOs fosters a sense of political empowerment to engage in collective actions that can change society. Membership in multiple CSOs allows ideas and behaviours to spill over the different contexts, diffusing explicit support for social justice principles (Paxton, 2007). Active involvement in associational activities, rather than passive membership, appears to be necessary for spill-over effects to occur (Putnam, 2000). Together with involvement intensity, type of association also influences the prevalence of spill-overs and the development of society-wide solidarity (Van der Meer et al., 2009).

Associations can be classified in three types that differ in their potential to influence support for SMU (Van der Meer et al., 2009). *Expressive* associations (sports clubs, cultural groups) would appear to have limited impact in stimulating support for SMU: these groups are created to generate friendship ties among members, without a central commitment to social justice issues. *Instrumental* groups focusing on the defence of a narrow set of members' interests (tenants' groups, parental associations) may tend to reduce the set of individuals whose rights 'deserve' to be defended. *Advocacy* groups (environmental and charitable organisations) have an internal logic that should enlarge the horizons of individuals who participate in them, that is, going beyond immediate personal interests to self-transcending perspectives favouring general social justice (Van der Meer et al., 2009).

Overall, we expect that, because of their *internal* experience within unions, leaders are more likely to support SMU than regular members. Moreover, we expect that external experiences in CSOs, especially in advocacy ones, should increase support for SMU.

3 | A MIXED-METHOD APPROACH APPLIED TO THE CASE OF QUEBEC TUs

Quebec, Canada, where we conducted our fieldwork, provides an interesting setting for exploring perceptions of and support for SMU. While some features of its industrial relations system are unique, in general Quebec adheres to the 'Wagner Act model' where workplace, business unionism prevails (Doorey, 2012). At circa 38% of the total labour force, union density is high compared to the rest of North America. Declines in union density over the last two decades have been modest, thanks in part to the public sector—which accounts for over a quarter of all employees in Quebec, one of the highest rates in North America—with a density of around 84% (Statistics Canada, 2022). At around 23%, private sector union membership is still among the highest on the continent. Most low-wage and precarious workers are unrepresented (Dufour-Poirier & Laroche, 2015).

Given Quebec's high levels of union density, and relatively moderate declines in it over time, SMU does not present itself as an emergent strategy to reverse negative membership trends. Bread-and-butter business unionism appears to be holding its own. Rather, in this part of Canada, SMU seems to be a proactive choice of officials who place it high on the agendas of their TUs to encourage support among the rank-and-file while engaging in direct government lobbying to promote the rights of unrepresented, precarious workers (Savage, 2010). In addition, Quebec is characterised by a vibrant civil society, providing an important stimulus for unions to expand their horizon beyond the workplace (Grenier & Jalette, 2016; Kennelly, 2014).

3.1 | A sequential mixed-method approach

Using a two-stage sequential mixed-method approach, we examined the points of view held by Quebec union officials regarding SMU. Step one involved qualitative interviews and step two consisted of quantitative analyses based on ad hoc survey data. The interviews were semi-structured, leaving union leaders the opportunity to express freely their perspectives on SMU. We avoided imposing any preconceived notions on the topics of interest (Greene et al., 1989). This allowed us to identify dimensions of SMU that union officials themselves considered crucial. Our interpretations of the interview findings guided the development of the

questionnaire we administered as the second empirical step. The nonrandom convenience sample was large enough for explorative quantitative analyses.

3.2 | SMU through the eyes of union officials: Insights from interviews

With the cooperation of Quebec's three major union confederations, we identified a group of union officials with whom to begin our fieldwork. Ten TU officials were recommended to us because they had experience with various aspects of SMU. These respondents suggested additional participants to interview from different unions and sectors, allowing us to constitute the full qualitative component of our fieldwork (Supporting Information: Table A1). The variety of new information diminished as we added respondents, reaching 'saturation' at 30 interviews, our stopping point (Guest et al., 2006).

These semi-structured interviews revolved around three aspects of SMU: (1) expanding TU priorities beyond the interests of dues-paying members; (2) developing strategies capable of having a positive impact for non-organised workplaces and individuals in the labour market; and (3) calibrating responses to the plight of an imaginary precarious immigrant worker. In the vignette, 'Maria' had been working for 5 years in a small pastry shop of four employees, all except Maria with strong anti-union sentiments. Maria was subjected to worse working conditions than those of her co-workers and had been recently dismissed from her job.

Salient passages from the interviews were identified through an iterative process in which each of us (and a research assistant) examined all transcripts independently and only subsequently discussed the main emergent points (Srivastava & Hopwood, 2009). We engaged in interpretation, conceptual clustering, and dimension reduction in choosing the appropriate excerpts. In what follows, exact interview citations are always placed between quotation marks and in italics. We also provide the index-number(s) of the interview(s) from which the quotes were extracted (the first index-number) and those that referred to the same idea (index-number (s) after the first one).

In categorising discourses of interviewees regarding conception of SMU and related attitudes, five dimensions emerged: (1) broadening union priorities beyond members; (2) relations with CSOs; (3) political action; (4) protecting all workers from dismissal; and (5) providing legal services to precariously employed non-members (the last two are presented in the same subsection below).

3.2.1 | Going beyond members

Broadening union priorities beyond the immediate interests of rank-and-file members was a widely shared view among the union officials we interviewed. It was viewed as a 'need' (23 and 12) and a 'question of survival' (22, 12, and 15). Interviewees frequently reported that unions must 'reach beyond the borders of the certified workplace' (29 and 1), to 'descend into the population' (7), to include non-members (23) and 'citizens' in general (28), and for boundaries to become blurred so that 'we cannot see a separation between unions and society' (4).

Going beyond union-society dualism appeared to be motivated by two goals. First, we noted a desire for unions to 'de-corporatise' (30), rupturing the widely held perception of unionism as a type of insurance policy. Insofar as you cannot 'be a militant [if you have] an insurance

policy!' (30), SMU would allow union members to advocate for social justice issues. 'It is fundamental that unions demonstrate they are more than merely corporatist structures that bargain unit by unit but that there are many more important and fundamental things [goals]' (3).

Second, according to the TU officials we interviewed, unions must be seen as working for a 'fairer and more just society' by being implicated directly in 'social struggles' (17 and 15)—such as 'a higher minimum wage, and better [working and living] conditions for everyone' (25), not just for the rank-and-file but also for 'non-unionised workers, for people in need, and the unemployed' (3).

3.2.2 | Relation with CSOs

Among our interviewees, the idea of TUs being open to engagement with societal issues beyond the immediate concerns of their members had to be pursued, first and foremost, through a 'vast, long, and large tradition of engaging with CSOs' (2), that 'gravitate around unions' (17), and the union's ability to 'knit' (5) and 'mesh' (29) these relationships into 'a large solidarity network' (23), sustaining common social and community goals (6). Many argued that collaboration between unions and CSOs is part of their union's DNA (16): '[unions] alone are nothing, but if [unions] associate with civil society, they can win many battles' (22, 6, and 15). Interviewees cited a panoply of different community and CSOs with which they have ongoing collaborations. CSOs are considered the important bridge between unions and the society at large (2, 5, 7, 15, 23, 28, and 30). The respondents envision three types of collaborations between unions and CSOs.

First, our interviewees reported the advantages of developing 'alliances' with CSOs to pursue workplace bargaining goals (3, 4, 22, and 27). Union officials underlined how they mobilised social groups to gain leverage against employers. Examples given included: parents' committees in the bargaining with teachers (3), local producers' associations allied with unions against the threat of closure of a wine store (4), joint action with handicapped and senior organisations to counter possible job cuts of a door-to-door delivery service (22), and aligning with local community committees and international human rights organisations to 'accelerate the resolution of the collective bargaining process' (27) in the case of a lockout in a mining multinational corporation.

Second, TU officials mentioned that unions are linked to CSOs through the financial and material support they provide to the latter. Some unions give part of their fees to local groups that target disadvantaged social strata. For instance, a local union reports that they have a 'charitable action' consisting of giving food to community soup kitchens (27). Another one assigns a monthly budget to 'community groups [...] and they can fill out a request and obtain the support if approved' (23). Yet another union provides financial support for a youth foster home (17). Some unions have established formal financial ties with organisations that defend the labour rights of non-unionised and migrant workers (15, 23, and 30). Many unions also allow CSOs to use their resources, such as speakers, photocopy machines, and union halls for meetings (18 and 23).

Finally, TU-CSO links are nurtured through union leadership training, conferences, and joint forums. Indeed, unions 'rarely [remain] hermetic' (7) in these events and open their training sessions and conferences also to community and CSOs (2, 13, 17, 22, 24, 26, and 28). Very often unions invite speakers from CSOs to inform and educate union members and

officials themselves about 'civil society larger issues' to sharpen their sensitivity around important societal matters such as 'the meaning of a democratic society', 'minimum wage', 'economic and environmental issues' (19 and 13). 'Often, the members themselves decide who they would like to invite as a speaker' from CSOs (13). The extent of collaboration between unions and CSOs is even more intense around forums (18, 25, 28, and 30), such as those organised at the international, national, and local levels (3, 6, 25, and 28).

3.2.3 | Political action

The third important area of SMU that we ascertained from our interviewees was the impact that TUs have on non-members when they engage in political action, especially when the latter cuts across different union organisational levels (local, sectoral, national) (2, 5, 9, 11, 17, 19, 24, and 26). Engaging in articulated campaigns with CSOs on 'larger claims and actions' (2), TUs collaborate to gain 'political impact' (2, 5, and 7). For example, such articulated actions may pressure the government to withdraw, modify, or implement employment legislation that affects the entire labour force, especially the most vulnerable non-unionised workers. There have also been campaigns to mobilise in favour of 'public pharma-care for all' (9), pay equity and parental leave (5); and against the privatisation of public services (2 and 17), austerity measures, the 'pillage of unemployment insurance' (2 and 25), and budget cuts concerning French courses offered to migrants (15). Regarding the latter, interviewees indicated that the involvement of TUs on such matters is necessary because such measures 'not only touch the working conditions of [our members] *but* [society] is also touched because they trigger a loss of many services for the society' (13, 2, 5, and 25).

In these campaigns, unions leverage their 'political link' (19) by taking the opportunity to present 'reports' and 'documentation' (24) to the government at the national, provincial, and, to a lesser extent, regional and local level. This illustrates the important union role for TUs in 'lobbying [the government], [and doing] citizens' representation vis-à-vis the government' (16, 3, 22, and 26). Indeed, such campaigns give unions direct access to the political sphere: 'When [unions] go into parliamentary commissions, they are heard on several [societal] topics because we are engaged together with the [societal] milieu' (6 and 11).

3.2.4 | Protecting all workers from dismissal, and (5) providing legal aid to precarious non-members

The first three dimensions of SMU in Quebec indicate that union leaders see a need to blur the distinction between the union environment and society. We now turn our attention to the reactions of these TU officials to the vignette about 'Maria'. Here, we found that openness extends only in a limited way to the protection of, and the provision of services to, precariously employed non-union members.

The vignette highlighted that in a context requiring a majority vote in favour of unionisation, it was impossible for Maria herself to form or even join a union – all her co-workers were patently against unionisation. This aspect was noted several times during interviews. Nonetheless, respondents manifested a marked reluctance to support Maria unless she joined a union. Unions have to 'help them' [workers like Maria] (24), and the best way to do so is to 'redirect them towards our unionising service' (5), [Maria] 'can be the carrier of

unions in her workplace' (28), so that she and the union 'will develop [...] a strategy [...] to achieve the 50%+1 [...] and there you go!' (17) and 'unionise their workplace' (4, 5, 9, 12, 15, 17, 24, 25, 26, 27, 28, and 29). Maria should convince her colleagues to join a union, since 'they might not have a retirement fund, an interesting insurance plan' (8) or 'collective insurance, pharma-care, a travel insurance' (11). Even after interviewees were reminded of the difficulties in unionising Maria's workplace, most continued to emphasise that 'besides unionisation there is nothing else [that] can be done for them' because 'unions are linked to a collective agreement and cannot help someone who is not unionised' (5, 12, and 30).

Our interviewees stressed repeatedly that direct union support effectively ends at the borders between the rank-and-file and non-unionised workers. Nevertheless, they suggested that Maria should be redirected to 'a panoply of CSOs' (11) that campaign for social rights or work with immigrant and non-unionised low-wage workers (4, 5, 21, 22, 23, and 25). They noted that such organisations in civil society could provide her with services that unions cannot provide (5, 6, 8, 10, 12, 23, and 29). In addition, these officials were aware that their unions 'have to see the human side' (9) of workers like Maria and at a minimum provide them with relevant, helpful information. In essence, TUs 'have an incredible role and a moral duty to inform people about their rights' (11). They emphasised that 'when people drop in and ask hey you are a union; may I ask you a question?' (20), unions should always be ready to provide answers (3, 6, 10, and 18).

Interestingly, when probed regarding the actual dynamics of how the current system could be improved to allow unions to provide Maria with concrete support to protect her working conditions, most interviewees replied in vague terms such as 'that's a good question!' (25). None of them, however, were willing or able to provide a prompt, concrete answer. The interviewed officials tended to view union actions occurring only in the background. They never pointed to tangible plans: 'unions exist for people like Maria ... but if you give me the mission to [protect her] [...] I would not know where to start [...], I would not know' (11). The short answer for protecting workers like Maria was considered as 'just [too] complicated!' (24 and 30).

Two TU officials, both involved in advocacy CSOs, suggested that unions should agree to provide some legal services to non-members (28 and 29). Specifically, they would have told Maria: 'Hey, come to our office someday, together we are going to fill out the legal claim and deposit it [with the court]. Afterwards, it is pretty common that there will be an employer-employee mediation [...] and we can accompany her through the mediation as well'. (28). Unions should provide 'legal protection against dismissals also to non-members [...] so that workers can achieve a better economic compensation [in case of dismissal]' (29). As noted above, however, all other interviewees were intensely reluctant to extend union legal services to workers like Maria.

In discussing these issues, the TU officials often alluded to the imagined reactions of their members: 'I pay union dues [...] and this is to have services, what are we doing, spending money for some people who are not in our union?' (20); 'I pay, I have the right [...]; you do not pay, you do not have the right [to union services]' (21); 'Unions belong to [members], the [officials] render a service [...] but you have to contribute financially [...] so it is difficult to open services beyond members' (21). Interviewees were trying to explain that financial resources for services are allocated by a financial plan that is adopted by the votes of members and therefore members would not likely be in favour of granting such services to non-paying workers. In short, providing legal services to non-members would be seen by the rank-and-file as 'a loss of time, resources, and energy' (11, 17, 18, and 21). One interviewee expressed it this way: 'finally, if you want to escape poverty, just join unions!' (6).

4 | SMU AS A MULTIDIMENSIONAL CONSTRUCT: AN EXPLORATIVE QUANTITATIVE ANALYSIS

4.1 | Goals, data collection, and empirical strategy

The qualitative insights described above illustrate that union leaders have a multidimensional conceptualisation of SMU. Further, they highlight tension between a high degree of support for SMU from an ideal point of view and the pragmatic reluctance to use limited resources to provide non-members with the protection and services offered to members. Interviewees also emphasised the relevance of external experiences in CSOs in supporting the more pragmatic aspects of SMU. These empirical observations in conjunction with our analytical framework guided the design of the quantitative step of our sequential mixed-method strategy.

Given the explorative nature of this study, we determined that a convenience sample would be well-suited to examine plausible associations among variables and to contribute to theory building (Clark, 2017). In line with our focus on union officials, we asked our contacts to forward the link to the survey to other officials, but we did not discourage them from sending it to rank-and-file members as well. After cleaning the data from 366 completed questionnaires, 309 were deemed to be eligible respondents. Among these, 26% were rank-and-file members and served as a useful baseline for exploring the extent to which holding an official position in unions has a positive influence on attitudes towards SMU.

Our dependent variables, support for the five dimensions of SMUs derived from the qualitative segment of the research, were indexed on a 1–7 scale (low to high). Following the rationale developed in our theoretical framework and the insights derived from interviews, we examined the effects that *internal* (within unions) and *external* experiences (with CSOs) have on support for each SMU dimension. For *internal* union experiences, we considered the role of the respondent in the union (member vs. official), the cumulative effect of membership (age the individual first joined a TU: 20 or younger; 21–30; 31 or older; missing). For the *external* experiences, following the 'kinship effect' in the experience-good model, we asked whether at least one parent was a union member during the respondent's adolescence. The most obvious indicator for a respondent's experiences outside unions (participation in CSOs) is a simple binary variable: being a *member* or not of at least one association. We also asked the type of association to which they belong: *expressive* (sports, cultural, and social associations), *advocacy* (environmental, charitable, women's rights, volunteering, and community associations), or *instrumental* (tenants', parents', and professional groups). We also considered the *intensity* of participation (non-member [0], passive member [1], active member [2]). For each type, we generated a ternary variable from this information: 0 if the respondent did not belong to any association of a specific type; 1 if the respondent was a passive member of one association of that specific type; 2 or higher if the respondent is at least passive member of two associations or active in one association of a specific type. Finally, we considered the number of *years* the respondent had been involved with CSOs as a member (1–5; 6–10; 11 or more; missing) and whether at least one of the parents was a member of an association when the respondent was growing up.

The survey was conducted in French. English translations of the questions are provided in Supporting Information: Table B1. Supporting Information: Table B2 provides descriptive statistics for these items. Insofar as the snowball sample is not representative, we have not included the usual socio-demographic controls in the statistical models. The explorative goal of this study is to focus on the impact that *internal* union experiences and external experiences in

CSOs have on the SMU support variables that we have identified. All models were estimated using OLS regression.

4.2 | Results

Figure 1 contains five boxplots indicating the median level of support (dark line), interquartile distribution (the box contains the second and third quartiles), and the mean (black circle) for the five dimensions of SMU. The numeric values associated with the plot are available in Supporting Information: Table B3. With median values equal to 6, there is high support for the first three dimensions: unions protecting the interests of all workers, developing alliances with civil society, and taking political action. The second dimension (alliances with CSOs) has the lowest dispersion (interquartile range of two, compared to three for the other two dimensions). There was somewhat less support for the last two dimensions: median level of support was four for unions providing protection against dismissals and only two for juridical aid to non-unionised workers. The latter variable also showed lower dispersion: interquartile range of three for juridical aid, compared to four for dismissal protection.

We regressed the five dimensions of SMU support in three nested models relating to *internal* union and *external* association experiences. *Model 1* includes only one predictor variable, that is, the individual's role in the union (official vs. member). *Model 2* adds the other union experience variables. Finally, *Model 3* includes CSO experiences. The full analyses are available in Supporting Information: Tables B4–B8. Looking at the overall pattern of results

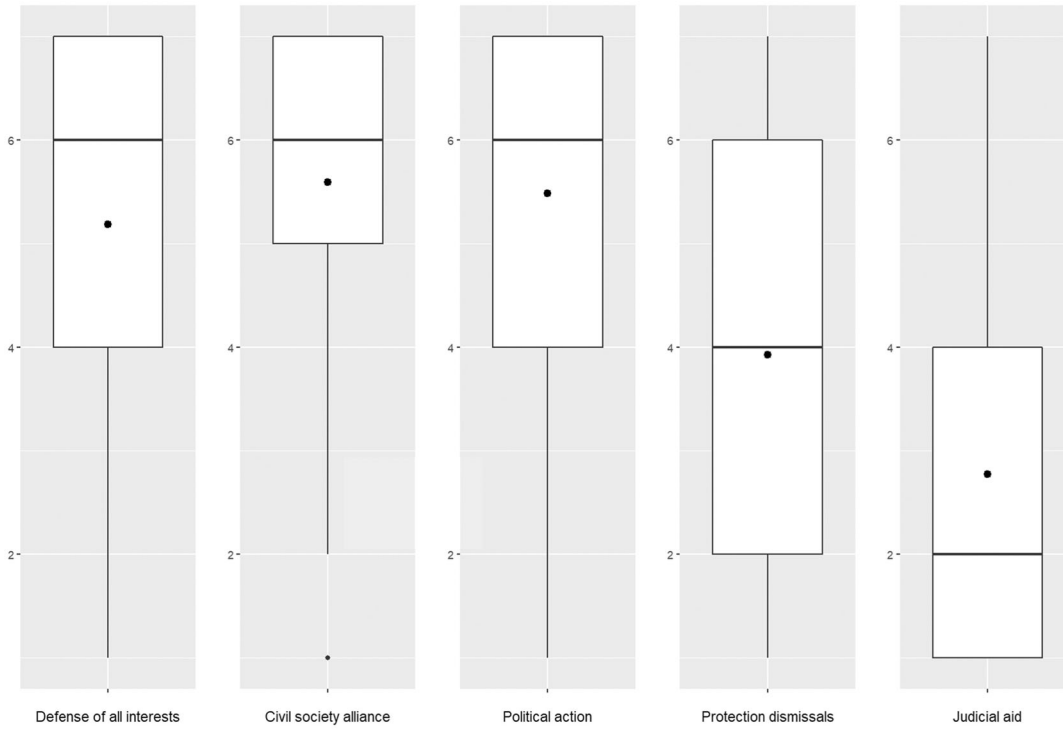

FIGURE 1 Boxplot and mean of the five dimensions of social movement unionism

across models in Supporting Information: Tables B4–B8, the estimates of the set of variables relating to the experiences within unions remain largely unchanged after including predictors related to civil society. Civil society experiences do not replace, and are not simply coincident with, those inside of unions. Rather, they are additive to one's role in TUs.

To facilitate the presentation of the main results, we condensed the original regression results into a summary table presenting only the coefficients and significance levels found in *Model 3* (Table 1). Our baseline average level corresponds to an individual profile having a 0-level on all independent variables (i.e., a union member with the lowest experience and no engagement in union and associational dynamics). The effects we compare are derived from this baseline by contrasting the intercepts associated with the five dependent variables in *Model 3*. The constants from the equations simply replicate the empirical pattern described in Figure 1: alliances with CSOs demonstrate the highest average support (4.70***), followed by the ideal of defending the interests of all workers (4.60***), the need for political action (4.38***), and finally the two dimensions related to pragmatic issues, protection against dismissals (3.35***) and juridical aid for all workers (2.68***).

Compared to regular members, union officials (0.74***) are significantly more supportive of the idea that unions should defend the interests of all workers, whether they pay dues or not. Further, officials are also more likely to support alliances with CSOs (0.43**) and even more so to sustain the need for political action (1.68***), the strongest significant relation in our analyses. The regressions, however, show no statistically significant differences between members and officials in supporting dismissal protection and juridical aid for all workers, both garnering low levels of support. Further, the only other variable relative to union experiences that is statistically significant is the decreased support for union political action for individuals who joined unions when they were older (20–30 years old −0.46**; 31 and older −0.69**). This implies that the need for political action is a union strategy favoured mainly by younger cohorts. No significant effect is associated with the union membership status of respondents' parents.

Simply being a member of a CSO does not have a significant impact on support for a union's need to develop alliances with CSOs or for taking of political action. Such experience is, however, statistically significantly associated with the idea that unions should defend the interest of all workers (1.05***), protect all workers against dismissals (1.03***), and provide non-members with juridical aid (0.56**). As illustrated in Figure 1, the two pragmatic dimensions have the lowest overall level of support among respondents, yet the regression analysis indicates that CSO experiences predispose respondents to embrace those positions.

In addition to *belonging* to an association, the *type* of association and the respondent's *intensity* of participation are also statistically significant predictors in our regression models, but with important differences among them. Respondents with a stronger involvement with *expressive* associations are in general less inclined to support the transformation of unions in the direction of an SMU; the relation is significant in the case of the idea that unions should defend the interests of all workers and develop more alliances with CSOs (−0.73** and −0.49*, respectively). The negative statistical relationship between higher involvement in *instrumental* associations and SMU is even more intense: higher involvement with instrumental associations has a significant negative impact on the idea that unions should defend the interests of all workers (−0.91***). This is also true for the two pragmatic dimensions of SMU (protection from dismissal for all −0.60*; and juridical aid −0.72**). Involvement with advocacy associations is different. The prevailing sign of the coefficients is positive, and the relationship achieves statistical significance for alliances with CSOs (0.47*).

TABLE 1 Extract of regression estimates

Independent/ Dependent variable (model 3)	All workers' interests	Alliances CSOs	Political action	Dismissal protection	Juridical aid
Constant	4.60***	4.70***	4.38***	3.35***	2.68***
Role					
Member (ref.)	0	0	0	0	0
Official	0.74***	0.43**	1.68***	0.39	−0.27
First age					
20 or earlier (ref.)	0	0	0	0	0
21–30	−0.034	0.062	−0.46**	−0.024	0.083
31 or later	0.016	0.074	−0.69**	0.43	0.47
Parents members					
Neither (ref.)	0	0	0	0	0
At least one	0.16	0.13	0.028	0.11	−0.034
Member of associations					
No (ref.)	0	0	0	0	0
Yes	1.05***	0.36	0.3	1.03***	0.56**
Expressive score					
0 (ref.)	0	0	0	0	0
1	−0.49	0.0067	0.26	0.36	0.23
2	−0.73**	−0.49*	0.019	−0.28	−0.22
Instrumental score					
0 (ref.)	0	0	0	0	0
1	0.43	0.12	−0.029	0.19	−0.02
2	−0.91***	−0.12	0.36	−0.60*	−0.72**
Advocacy score					
0 (ref.)	0	0	0	0	0
1	0.22	−0.3	−0.41	0.23	0.11
2	−0.054	0.47*	0.11	0.12	0.052
Years member					
1–5 (ref.)	0	0	0	0	0
6–10	0.35	0.62**	0.15	0.11	0.73**
11 or more	−0.34	0.4	0.098	−0.42	0.17

(Continues)

TABLE 1 (Continued)

Independent/ Dependent variable (model 3)	All workers' interests	Alliances CSOs	Political action	Dismissal protection	Juridical aid
Parents members of associations					
Neither (ref.)	0	0	0	0	0
At least one	0.072	0.22	0.087	−0.092	−0.0037

Note: * statistically significant at the 0.10 level; ** at the 0.05 level; *** at the 0.01 level.

Respondents who have been members of an association for between 6 and 10 years are more supportive of SMU with respect to those who have either shorter or longer experiences. Specifically, duration of involvement has a significant positive impact on the idea that unions should develop more alliances with CSOs (0.62**) and provide juridical aid to all workers (0.73**). Having parents who were members of CSOs during a respondent's adolescence is not a statistically significant predictor variable in our regression models.

5 | IDEALLY INCLINED, PRAGMATICALLY RELUCTANT: DISCUSSION

The prevailing SMU debate has focused on organisational actions by TUs towards civil society that might play a role in the possible transformation of workers' associations into a social movement. We have argued that the empirical exploration of the drivers of SMU would benefit by shifting the focus from this *outward* perspective at the macro- and/or meso-level to an examination of support for SMU within unions to capture the individual point of view of union leaders, that is, an *inward* perspective at the micro-level. By employing an explorative sequential mixed-method approach, our findings provide insights that enrich the SMU debate in that direction.

This study has provided several *analytical contributions* to the SMU debate. First, we illustrate the utility of focusing on outward renewal strategies that champion the interests of all workers by means of greater union integration in society. Second, qualitatively and quantitatively, we show the value of treating SMU as a multidimensional phenomenon to allow different determinants of support to emerge in explaining each aspect of this complex construct. Third, our conceptualisation of union leaders as centres of resonance uncovered a dynamic tension between ideal tendencies within unions to defend the interests of all workers and the constraints to providing support for non-members. 'Ideals' (promoting labour rights of all workers, developing alliances with CSOs, taking political action) and 'pragmatic' concerns (providing services and legal aid to oppressed non-members who have been unfairly dismissed) were shown to have different patterns and levels of support. While the 'ideal' dimensions have been explored in the SMU debate, the pragmatic side deserves more attention.

A significant *empirical contribution* is the finding that holding an official position (*internal* experience) increases the chances of supporting the *ideal* dimensions of SMU. Officials appear to favour having unions develop social movement-oriented strategies, to have their organisations become 'swords of justice' that collaborate with CSOs, and through political

actions to build a more equitable society in defence of all workers. Interestingly, quantitative results show that the political involvement of unions is mainly supported by younger respondents. Older leaders see unions as focused solely on industrial relations through collective bargaining, while younger generations take a more engaged and militant view of unionism in the political arena.

Despite awareness of the issues facing precarious non-members, the *ideal desire* of union leaders to represent all workers is counterbalanced by *practical constraints*. Leaders are not as likely to support having their unions engage in pragmatic SMU practices such as providing actual protection and assistance to vulnerable non-unionised oppressed workers. Those are union services perceived as an exclusive union benefit, a useful instrumental incentive to attract new members and that officials themselves are not ready to share due to 'fairness' considerations vis-a-vis dues-paying members (Tapia, 2013). TU officials overall emerge as social actors who are 'ideally motivated' but 'pragmatically reluctant' to fully embrace SMU. Union leaders themselves clearly see the tension between the pragmatic and ideal goals of SMU. Recognising that an 'all are welcome' policy could exhaust the resources of their legal departments, SMU-inclined labour leaders appear to search for ways to explain to their membership the need and usefulness of creating some avenues for supporting outsiders, especially for hardship cases. In particular, members' support could be increased by highlighting the opportunities for community outreach and 'growing' public support for unions associated with these initiatives.

The exception to this portrait are union leaders who have had *external* experiences in CSOs. In their case, protecting the interests of all workers is the ideal component most positively affected by their involvement in at least one association and, interestingly, the two pragmatic dimensions (dismissal protection and juridical aid for all workers) follow closely behind. While for some who hold union office certain practical issues appear insurmountable, those who have been exposed to new ideas through their participation in CSOs adopt a radically different stance on desirable union actions. From the perspective of internal union dynamics, focusing solely on the interests of members looks like a necessity, but this ceases to be the case when external activist experiences reveal new possibilities: seeing the complementarity in fighting for fairness for members ***and for*** society's lower ranks. External experiences in CSOs generate a sense of 'solidarity' that encompasses precarious non-members, concretely promoting unions to defend their labour rights, even though these workers do not financially contribute to unions. Using an expression uttered by one of our interviewees (30), association experiences trigger a more radical '*de-corporatisation*' of the idea of what unions should be. This represents a fundamental step in fully transforming TUs into a social movement, in both its ideal and pragmatic dimensions. Our findings suggest strongly that union *internal* and associational *external* experiences are cumulative, affecting SMU views through different channels.

Our results have *theoretical* implications. We confirmed the utility of drawing on the experience-good model in highlighting the pivotal position of union leaders for studying support for SMU. The experience-good model holds that union dynamics are mainly influenced by internal (being a union official) and external (kinship influence) experiences (Gomez & Gunderson, 2004). We have demonstrated that a refinement of this model can be used in studying support for SMU. *Internally*, the experiences of union leaders must be differentiated from that of rank-and-file members to understand the focal position of leaders. Union leaders are very aware of the decline in resources due to falling membership numbers. Further, leaders understand the contradictions between the demands of their members and those of a rising portion of precarious workers. *Externally*, background experiences with different types of CSOs,

rather than kinship networks, make union leaders (as compared to members) better able to understand the potential of, and the need for taking some steps towards SMU.

Finally, our study has implications for *union policies* that could facilitate a transition to SMU. Union leaders can develop widespread support for SMU by promoting the experiences of members in various dimensions of SMU, especially the least supported ones. Educational and informational sessions dealing with the personal stories of oppressed workers might sensitise members, enhancing the low level of support expressed for the pragmatic components of SMU. Structurally, higher cyclical turnover of members into official positions and vice-versa may provide stronger support for SMU ideal dimension. Strong involvement in advocacy associations appears to be foundational for individual-level adhesion to the pragmatic aspects of SMU. Union policies could internally promote members to official positions or recruit external people to fill vacant official positions if they have some years of experience in advocacy associations. Union leaders could also encourage recurrent exchanges of personnel between advocacy CSOs and unions for a period of time as a way to cross-pollinate the two cultures. Our data suggest, however, that there is little movement of personnel between unions and CSOs and when it does occur, it is usually a one-way career change with virtually no circular mobility. Layering different union internal and external policies in re-structuring and re-sourcing their organisation could potentially accelerate SMU.

6 | IDEAL VERSUS PRAGMATIC TENSION IN SMU: DELVING DEEPER AND WIDER

We examined several heretofore unexplored facets of SMU, and our preliminary evidence and findings indicate promising directions for future investigations of the micro-foundations of SMU. We are, of course, aware that our study has limitations: it is based on an explorative research design, the samples are not representative, and the findings cannot be generalised to all Quebec unions, nor outside Quebec. Representative surveys are needed to test the dimensions and scales that we have developed and presented. Statistical analyses of such data would be able to go beyond the explorative regression analyses that we used illustratively in this study. Building on the present findings, new qualitative and quantitative research could uncover causal mechanisms. A more complete picture of these dynamics requires attitudinal studies regarding various dimensions of SMU and their intersection with the characteristics and experiences of union officials, rank-and-file individuals, and even non-members. One additional caveat is in order: we cannot exclude the possibility that Quebec's characteristic industrial relations system may be highly specific, even in the configuration that defines the TUs movement in North America. Employment contexts with lower individual constraints on joining unions (different than the typical North American Wagner Act jurisdiction) and where there is a more pervasive concern with declining union density may generate views towards SMU that could be different from those described in this paper. An interesting framework to evaluate the external validity of our findings in future research may be provided by Hyman's (2001) eternal triangle, highlighting the tension existing among TUs logics: labour market, social class, social integration.

Industrial relations contexts where market and social class logics predominate and reinforce each other may be those in which the pragmatic dimensions of SMU described in our paper may matter much more than ideal ones in hindering it from being fully embraced. For example, for unions that are influenced strongly by market and class logics or that display highly militant

behaviour with strongly bounded solidarity, one might hypothesise a decreasing likelihood of embracing SMU. Conversely, for unions that lack a strong class-based-orientation and present an encompassing and balanced orientation towards labour market issues experienced by all workers, SMU might be very attractive. Quebec probably lies in-between these ideal-types, allowing moderate class-based tendencies to generate contradictions between ideal and pragmatic dimensions of SMU.

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SUPPORTING INFORMATION

Additional supporting information can be found online in the Supporting Information section at the end of this article.

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