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# **The Leadership Component of Kelly's Mobilisation Theory: Contribution, Tensions, Limitations and Further Development**

## **Introduction**

While many industrial relations academics have acknowledged the importance of the different stages in the mobilisation process highlighted by Kelly's *Rethinking Industrial Relations* (RIR) for understanding the social processes by which the dynamics of collective action occurs, most research influenced by this has placed particular emphasis on his identification of the key driving role played by activists and leaders (Blyton and Jenkins, 2012; Buttigieg et al., 2008; Connolly, 2010; Cregan et al., 2009; Darlington, 2002; 2009; 2012; Gall, 2000; Greene et al., 2000; Heery and Conley, 2007; Johnson and Jarley, 2004; Metochi, 2002; Simms, 2007; Simms and Dean, 2015; Taylor and Bain, 2003; Taylor and Moore, 2015). Yet the nature and process of leadership and its relationship to collective mobilisation has remained relatively understudied and inadequately theorised by industrial relations (and social movement) researchers generally.

In the 1970s and 1980s several highly insightful sociologically-inspired case studies provided rich narrative accounts of workplace industrial relations that confirmed the centrality of shop stewards' leadership to the dynamics of collective action (Armstrong et al., 1981; Batstone et al., 1977, 1978; Beynon, 1973; Edwards and Scullion 1982; Lane and Roberts, 1971; Nichols and Armstrong, 1976; Nichols and Beynon, 1977; Pollert 1981), underlining the point that mobilisation theory did not completely re-invent the wheel. More recent work has also contributed to our understanding of how, despite reduction in numbers and influence, workplace union reps retain the potential ability and willingness in certain circumstances to encourage collective struggle, including the threat or use of strikes, to defend workers' conditions and extract concessions from management (Cohen, 2006; Darlington, 2010; Moore, 2011).

But Kelly's analysis of the relationship of activist leadership to collective action within the overall jigsaw of mobilisation theory provided a more sophisticated, multi-dimensional and dynamic analytical framework from which to understand such processes.

The role of leadership – viewed as embracing workplace union reps, other activists and full-time union officers at local and national level – was related to a variety of social-psychological features of industrial relations and trade unionism beyond the narrow field of bargaining. In turn, this was embedded within an often-neglected broader capitalist political economy and structural context through which the social relations of power between employers (and the state) and workers could be understood. A refreshingly unequivocal Marxist class struggle perspective that ‘took sides’ underpinned the approach. Even if it is ironic that this re-evaluation of Kelly’s work on mobilisation theory in general and activist leadership in particular should take place during prolonged historically low levels of strike activity throughout the west, it remains of continuing relevance to understanding how collective action as manifested in strike activity can emerge and develop.

This reassessment of Kelly’s leadership component within mobilisation theory, both in *RIR* and other writings (1997; 2005a; 2005b; 2011; Kelly and Badigannavar, 2004; Badigannavar and Kelly, 2005), draws on social movement literature, studies by industrial relations scholars utilising aspects of Kelly’s approach - including this author’s own work - and related research on union leadership within collective mobilisation. In the process, it provides a synthesis of this existing literature with a view to illuminating some common themes and dilemmas. The article first identifies and celebrates how Kelly’s work, whilst contributing a distinct and substantive actor-related approach, recognised that leadership is one ingredient amongst other factors, including important structural opportunities and constraints. It next considers three potential ambiguities/tensions within Kelly’s conceptualisation of leadership related to the social construction of workers’ interests, spontaneity of workers’ action, and ‘leader/follower’ interplay. The review then identifies two important limitations, related to the union member/bureaucracy dynamic and the role of left-wing political leadership, and concludes by signalling different forms of leadership relationships on which further refinement and development would be fruitful.

### **Contribution**

Kelly’s (1988: 44) attempt to integrate mobilisation theory into industrial relations rebalanced the analysis of the employment relationship away from the primarily *objective*

structural and institutional emphasis of much historical and contemporary research by explaining strike activity using an analytical framework that recognised the central role of the *subjective* agency of activist leadership in channelling workers' grievances into collective forms of mobilisation. Distinctive structural and institutional factors may be important in creating a more or less favourable environment for encouraging workers to develop a consciousness of collective grievance, form a strong attachment to unions, and be willing to engage in strike activity. But on their own such factors are inadequate, failing to explain why opportunities and limitations they illuminate become realised by those involved on the shopfloor and why union solidarity and strike activity in similar structural and institutional conditions can vary considerably. Such factors have to be considered in combination with how social actors intervene within these circumstances, in terms of how different forms of collective organisation and activity are affected by the perceptions, intentions and strategies of workers involved in particular workplaces (Franzosi, 1995).

Kelly's approach contributed to rectifying the deficiency. At its heart is the argument that it is not enough for workers just to hold a grievance for strike action to occur. The workers concerned must hold a collective sense of 'injustice', recognise that their interests are different from their employer's, and attribute the source of their grievance to their employer's actions. But crucially a mechanism needs to exist, specifically a small but critical mass of leaders/activists (Kelly, 1998: 44) who can stimulate this process and channel discontent into collective organisation and action. Only by including agency and leadership in the mix is it possible to obtain a holistic analysis of the mobilisation process.

Kelly identified four key features of the leadership role played by union leaders/activists (1988: 34-35; 127). First, they carry arguments and 'frame' grievances so as to promote a sense of 'injustice' amongst workers to persuade them that what they may have hitherto considered 'normal' or 'acceptable' is actually unjust. Second, they encourage a high degree of work group cohesion and identity, so that workers think about their collective interests as distinct from and opposed to their employer, attributing their grievances to the actions of employers (and potentially the government) rather than impersonal forces. Third, they urge the need and justify the appropriateness of collective organisation and action as a means to rectify injustice, based on a cost-benefit calculation.

Fourth, they legitimise collective action against counter-mobilising arguments from employers and other workers that it is illegitimate.

At the same time, Kelly recognised that the dynamics of leadership has to be analytically anchored within a broader context of social, economic, political, and organisational variables within the workplace and society generally, that place both potential facilitating and constraining factors for collective mobilisation. Thus in attempting to understand why workers are open to suggested strategies for action from activists, and why they find certain arguments persuasive, Kelly's use of mobilisation theory placed a broad range of 'opportunity structure' factors (McAdam, 1996; Tarrow, 1998; Tilly, 1978) at its centre. Factors identified include: national and international labour markets and product market competition; state of the economy; role of government, system of labour regulation and extent of legislative support for unionism; employer and management strategies and policies; industrial and organisational context; occupational structure and labour process; nature of workers' grievances; strength of bargaining position and strategic disruptive capacity of collective action; level of trade union membership and strength of workplace organisation; balance of power between workers and employers; and traditions of solidarity (Kelly, 1998: 39-65; 2005a: 66; 2005b: 286-7).

In contrast to the industrial relations writers who emphasise the determination of union behaviour through markets and other impersonal forces, or through the superior power of agencies such as employers, managers and the state (for example: Bain, 1970; Charlwood, 2004; Clegg, 1976; Simms and Charlwood, 2010), Kelly's utilisation of mobilisation theory recognises the complex dialectical interplay between structure and agency – or what we might term *objective* conditioning and *subjective* influencing factors both internal and external to workplace and union which can shape the emergence and dynamics of collective action. As Martin (1999: 1208) acknowledged, Kelly provides a set of analytical tools for exploring how leaders and activists can interpret relevant structural contexts, identify potential strengths and weaknesses, and decide how they might be exploited to encourage collective mobilisation.

Despite mobilisation theory being well received, there have been relatively few thick-textured empirical workplace studies over the last 20 years that have explored the role

of activist leadership in framing issues conducive to action within its broader context (including Beale, 2003; Gall, 2003a; Connolly, 2010; Heery and Conley, 2007; Taylor and Bain, 2003; Taylor and Moore, 2015). Nonetheless, in explaining the militant industrial and political militancy of the National Union of Rail and Maritime Workers (RMT) on the railways and London Underground, Darlington's studies (2002; 2009a; 2009b; 2012; 2013; 2012) have underlined the efficacy of mobilisation theory – and its leadership component specifically - as a tool of analysis.

Such studies have shown the important *objective* (and to some extent sector-specific) features (including the political economy context, homogeneity of a large predominantly manual workforce with a strong occupational identity, relative high union membership density, and strong bargaining leverage arising from the operational vulnerability of both the railway and Underground systems to strike action) that have contributed to creating a favourable environment for workers to engage in militant union activity compared with the more quiescent labour and union response in other industries. Yet these studies have also suggested an important catalyst, stimulant and beneficiary of the RMT's industrial militancy has been the *subjective* role of a significant number of combative leaders, reps and activists at every level of the union. These actors have identified and articulated grievances, framed vague feelings of discontent into a firmer sense of injustice, encouraged the process of 'social identification' whereby they come to define their interests collectively in opposition to employers/government, and taken the initiative in mobilising for strike action as an effective means of collective redress. Such leadership has made a crucial contribution to the process by which workers have been willing to engage in strike mobilisation.

While Kelly's mobilisation theory has primarily been utilised to analyse collective action through strike activity, it has also facilitated understanding how the effectiveness of 'union organising' campaigns is highly contingent, with considerable variations between different workplaces in ostensibly similar contextual situations, reflecting different leadership capacities of workplace unionism (Gall, 2003b; Simms et al., 2013). In this respect Badigannavar and Kelly's comparative study (2005) of two matched union organising campaigns in Higher Education was instructive. It revealed that as well as relevant extrinsic influences (such as the impact of local labour markets on the balance of power and

bargaining position in the two case study universities), of vital significance were the different 'collective action frames' (Snow and Benford, 1992) promoted by the respective local union leaderships and adopted by workers, which in turn were associated with varying outcomes. Compared with Welsh University, Leeds University was more successful because its militant strategic orientation was more effective in voicing workers' concerns, encouraging greater social cohesion and stronger union identification, blaming the employer for problems, and highlighting the benefits of union membership. Objective 'opportunities...can be seized or missed; they have to be both *perceived* and *taken*' (Barker, 2012: 4), and that requires activist leadership that can provide a shared strategic perception of possibility and of the means to take advantage of it.

In sum, Kelly's leadership component of mobilisation theory firmly integrates into the analysis of the employment relationship an approach recognising the objective structural circumstances that can potentially constrain and facilitate collective mobilisation, but also highlights and develops our understanding of the subjective dimensions of workers' organisation, consciousness and activity - with activist leadership a key potential lever in the mix.

### **Ambiguities/Tensions**

We can now examine three potential ambiguities/tensions within Kelly's conceptualisation of leadership within the mobilisation process.

#### *The social construction of workers' collective interests*

To begin with there is the question of the extent to which workers' collective interests and identities are generated directly from the structural contradictions of the capitalist labour process, and how they are formed and socially constructed through the role played by union leaders/activists through the processes of workplace interaction. In exploring Kelly's grappling with this dualism, the distinction made by Heery (2003: 291) concerning the role of leadership is useful.

Heery draws attention to how Hyman (1972: 188; 1997: 310; 1999: 96) emphasises the mediating activities of union activists and those in formal representative roles to the process by which workers' multiple, fragmentary and often contradictory grievances and aspirations are selected, filtered and prioritised into collective forms of interest, identity, assertiveness and struggle. But Heery also points out that Kelly (1988: 32-3) assumes that leaders and activists do not merely *select* but also play a necessary role in interest *formation*. The intervention of activist leadership is decisive in promoting 'social identification' (perception of common interest amongst union members) and 'attribution' of the sources of discontent to employers (perception of opposed interests), and thereby framing and 'shaping people's definitions of their interests' (p. 33) as a means of legitimising collective action. For Simms et al. (2013: 28) Hyman's and Kelly's importance is that they *both* emphasise 'the way in which the processes of building solidarities and collectivism are socially constructed. In other words, solidarity and collectivism do not simply exist – and, importantly, never have existed – independently of the work done by interested parties [trade unions, political parties and other interest representation groups]'.

Yet the potential danger of such an interpreted formulation is that it could imply Kelly's approach assumes that the process by which workers' collective interests are created, defined and developed is not something which is (in part) generated by objective and material conditions underlying workers' experiences, consciousness and action. Indeed Cohen (2006; 2010), Atzeni (2009; 2010) and Ghigliani (2010) have claimed that Kelly's focus on how subjective feelings of 'injustice' towards employers induced by leaders acting as a key trigger for mobilising workers to take collective action is analytically flawed because it allegedly fails to take account of the way in which the dynamics of capitalist social relations provides the basis for existing collective workers' organisation, struggle and consciousness.

In fact, although it is not precise in his exploration, Kelly's analysis (like Hyman's) is placed firmly within the structural contradictions of capitalism, with collective identity and organisation emerging from workers' grievances that stem directly from the inherently exploitative and conflictual nature of the employment relationship. It does not deny the way in which workers' construct their *own* grievances and collective forms of interest and identity irrespective of the existence of leaders as such. In the process, there is due recognition of how the development of collective action can be transformative, cementing



ideas of injustice and increasing collectivist identities and aspirations (Moore, 2011: 56). But what Kelly's mobilisation theory approach *also* recognises is the way in which, as Canel (1992: 49) has explained, 'the processes of definition of common interest are not determined by objective conditions alone; interests are constituted and articulated through ideological discourses and therefore do not have a prior existence independent of the awareness of social actors'.

In other words, union activists and leaders *not only* play a key role in identifying, highlighting and articulating workers' own salient definitions of their collective interests, *but also* in actively forming, generating, shaping and redefining them in ways which can either 'underscore and embellish the seriousness and injustice of a social condition or redefine as unjust and immoral what was previously seen as unfortunate but perhaps tolerable' (Snow and Benford, 1992: 137). In a similar fashion to Batstone et al.'s (1977; 1978) identification of the role of the shop stewards and other influential workplace figures in a protracted process of communication, 'mobilisation of bias' and 'systems of argument' to reinforce the collective interests of the group, Kelly shows how the development of workers' interests into collective forms that attribute a sense of injustice and create social identities is a *socially constructed* process. Thus Kelly's approach – even though *RIR* could have been more explicit - posits the need to explore the social processes by which workers' grievances, sense of injustice and collective identity are *both* created/defined *and* shaped/redefined; they are materially generated within the capitalist labour process as well as constructed and collectively reworked in the course of activist leadership operating at local and national levels.

A similar point could be made about how workers' 'solidarity' action is objectively generated from the conflictual nature of social relations at work and subjectively framed by activists. In this respect Taylor and Moore's (2015: 90) study of the British Airways Stewards' and Stewardesses' Association's (BASSA union) protracted 2009-11 campaign of strikes, notwithstanding the challenging nature of the union membership's 'multiple identities and transient workplaces' (p. 94), is highly relevant. Utilising Kelly's approach, Taylor and Moore located the sources of *informal* collectivism that underlay the dispute in a distinctive labour process that involved intense work routines performed in cramped workspaces that demanded close interaction, lubricated social bonds and encouraged in-work solidarities.

But they reported that equally significant was the organisation and leadership of BASSA, whose role in *formal* collectivism, as joint regulator of working conditions, gave structure and meaning to crews' apparently ephemeral 'collectivities' and effectively articulated workers' interests by transmuting feelings into perceptions of commodification (p. 94). Therefore, while the study confirmed that collectivism is located within the context of a concrete employment relationship, it also connected the labour process to collective union-organised mobilisation and the significance of activist leadership ideological frames and legacies in the ways that Kelly's work highlighted (p. 95).

### *Spontaneity of workers' action*

A related potential ambiguity/tension in Kelly's overall approach concerns the extent to which mobilisation can originate in the more or less spontaneous action of workers, rather than requiring leaders to encourage and lead collective action. Both Atzeni (2009; 2010) and Cohen (2010) have claimed that Kelly fails to sufficiently acknowledge the way in which because conflict is rooted in the structurally exploitative and conflictual nature of the capitalist labour process it can produce spontaneous and unorganised forms of workers' resistance that are not dependent on an alleged 'stageist' process in which 'vanguardist' (Fairbrother, 2005) leaders are required to frame workers' grievances in a mechanical pre-determined movement from injustice to collective action. Cohen (2014: 147-148) claims there are historical examples of spontaneous walk-outs with no clearly defined demands, no experienced activists or recognised leadership of any kind, and no union in existence – and yet with unorganised workers forming a strike committee in a 'union before the union got there' dynamic (p. 148). Likewise Atzeni (2009; 2010) argues that, while it cannot be contested that often mobilisation follows Kelly's temporal sequence, and that leaders often play a central role, it was structural product and labour market conditions which encouraged workers to spontaneously occupy two car factories in Argentina and challenge property rights in a revolutionary fashion, but without any previous organisation or militant preparatory work, and with 'natural' leaders only emerging from the mobilisation, rather than being a precondition for it as Kelly suggests is necessary.

Is this elevation of spontaneity as a means to critique Kelly's approach justified? It should be acknowledged there is some potential danger in Kelly's argument if we were to read it literally, or at least a failure to consider in any way the varied manner in which collective action can sometimes (albeit much less so in the UK currently compared with the 1960s and 1970s) break out in a seemingly unplanned, uncoordinated fashion and without a guiding hand that has pre-formulated or 'framed' grievances. Thus in *Wildcat Strike* (1955: 63) Gouldner reported that the plant was a 'powderkeg' which had 'blown up' in the unpredictable manner of a natural eruption - rather than in accordance with the purposive preparation of leaders - with the absence of a well formulated set of union demands. Knowles (1952: 6) contended that strikes are rarely 'carefully planned and premeditated; still less often ... dictated by considerations of strategy. Most often they are more or less spontaneous outbursts against "injustice"'. Such studies might suggest the common stereotype of the strike as a deliberately calculated stratagem (either organised by trade union officers or fanned by shop-floor activists or 'militants') may not be characteristic of all, or even most, disputes. Instead, such conflict tends to originate in the often impulsive and unorganised action of workers and lacks leadership.

However, even if there is sometimes an important element of spontaneity in strike activity, Kelly's approach reminds us that there is no *automatic* relationship between shopfloor grievance (and anger) and collective action. Even with real material grievances, rooted in exploitative and antagonistic social relations, *someone* must articulate them and suggest practical remedies. From this perspective 'pure spontaneity does not exist' (Gramsci, 1971: 50-51; 196-8) because even within the initiation of what appears on the surface to be 'spontaneous' strike activity - where there is no official or easily identifiable activist leadership - that does not mean there are no leaders, even though this may not be recorded. Some form of leadership takes place because an individual person or group takes the initiative to walk off the job and then bring the actions and demands of a determined minority to the mass of workers to do likewise. Drawing on pre-existing informal communication networks, an apparently spontaneous action creates varying levels of conscious leadership and organisation as workers' basic sense of discontent is articulated, amplified and actualised.

For example, Fantasia's (1988: 110-111) micro-study of the internal dynamics of wildcat strike action reported how a small group of the most confident workers pulled into action a more hesitant group who in turn influenced the least confident, with a union militant eventually articulating their discontent with management and connecting this to inaction on the part of the local union leadership. The action was structured in certain ways that gave rise to organised forms that could then lead, plan or harness workers' spontaneity in a more systematic way. 'In posing a dualism between spontaneity and the planned or rational calculation of collective action, the presence of the structured elements *within* spontaneous action may be missed' (p. 111). Likewise Taylor and Bain's study (2003: 154) of the campaign to unionise a call centre showed that although the experience of work led many to profound disillusionment with their employer and a deep well of often unfocused discontent, fuelling a sense that 'something had to be done', what proved crucial was the 'cognitive liberation' (McAdam, 1982) of a key actor (Dave) and several other individuals who acted as a fulcrum for a leadership group of core activists. 'Leadership proved decisive' (p. 170) in turning disgruntlement into a sense of injustice, encouraging collective interest identification, and in acting like a small cog that turned a larger cog that in turn influenced wider layers of workers into engaging in collective action (p. 163).

Furthermore, even if the origins of collective action do not necessarily depend on the leadership of established workplace activists, the overall direction of such action once started *can* be profoundly influenced by key individual figures. As the study of the sustained campaign by Burberry workers against factory closure in South Wales by Blyton and Jenkins (2012: 4-5) underlines, collective mobilisation is not a *single* process - something attained and accomplished at the moment when action is triggered, but essentially an *on-going* process that develops as a dispute progresses.

In this respect, as the account of the Pilkington's strike by Lane and Roberts (1971: 160) documented, even though it apparently emerged out of 'nowhere', once under way in one small area the strike spread to all six plants on the site and gradually drew the mass of workers into activity through the determined efforts of a small handful of union activists. Of crucial significance was how the meanings, purposes and objectives of the strikers' cause only became explicit *after* the stoppage was already in progress, with activist leadership effectively selecting specific demands from among the strikers' pre-existing grievances and

aspirations. Once started, the strike's subsequent development at every stage and turning point was intimately tied up with the character of strategic leadership provided in response to the changing nature of management counter-mobilisation.

Whilst Kelly's formulation of leadership in *RIR* makes no real distinction between 'spontaneous' and more 'organised' forms of collective action, he does not assume it is only predicated upon a pre-existing formal leadership rather than a more naturally emerging phenomenon that can be essential to its development and success (Moore, 2011: 68). Alas, this is not made explicitly clear. Yet studies of workplace mobilisation in non-unionised contexts (Moore, 2013; Taylor and Bain, 2003) have clearly revealed that, although activists with a previous history of union activism and prior collectivist orientation can be central to the success of organising campaigns, they are not a precondition for mobilisation. It is not only possible for collectivism to be generated purely from the experience of workplace employment relations, but also for leadership to emerge 'organically' in the course of the struggle and to be shaped by it. Notwithstanding such distinctions and nuances in conceptualisation, Kelly's approach highlights that while pre-existing or organically developing union activists do not create the underlying material conditions that encourage conflict and mobilisation, they are critical in stimulating awareness of workers' grievances, sense of injustice and potential for collective action for redress, and taking the lead in initiating and in the future direction of such action.

#### *'Leader/follower' interplay*

A third related ambiguity/tension in Kelly's approach is that mobilisation theory can be viewed as placing all the emphasis on the role of a small number of 'leaders' or 'activists' in promoting and transforming the interests and identities of union members in the course of collective action, to the neglect of the role of 'ordinary' union members themselves (Fairbrother, 2005; Hogan and Greene, 2003). On this point, although the critique of Kelly is overstated, there is some justification for acknowledging the potential shortcomings of his somewhat 'leader/follower' analytical conceptualisation.

It is true Kelly recognises that leadership goes all the way down the trade union movement and is exercised at many levels, not simply by office-holders and those in formal leadership positions – such as union reps and officers – but also by workplace ‘activists’. However, the reciprocal and dynamic relationship between ‘leaders’ and so-called ‘followers’ (Kelly, 1992; Kellermann, 2008) or reps/activists and members (Darlington, 1994; 2002), is something that Kelly does not dwell on. This opens the door to the claim that he presents leaders/activists as the active principle, with members as relatively passive recipients of the mobilisation efforts of others.

While Batstone et al. (1977; 1978) showed that shop stewards often play a critical role in shaping members’ attitudes and views and facilitating involvement in forms of collective action, members were more likely to be mobilised by shop stewards (irrespective of whether they were ‘leaders’ or ‘populists’) who were responsive to shopfloor concerns and reflected the needs and aspirations of their rank-and-file members, including influential ‘opinion-leaders’ and ‘grievers’ (1978: 1-2; 64). Other studies (Buttigieg et al. 2008; Darlington, 1994; Fosh and Cohen, 1990; Metochi, 2002; Nicholson, 1976) have confirmed that workplace union reps who are accessible, inclusive (by involving members in consultation and decision-making), and pay attention to the demands and views of their constituents, are likely to be more effective in translating particular workplace grievances and injustices into collective action.

Meanwhile, with reference to the relatively unsuccessful union organising tactics adopted over recent years (derisively dubbed as ‘shallow mobilising’) that have allegedly merely engaged with ‘*pro-union activists*’ - who display an ideological commitment to the cause but do not influence many other workers, McAlevey (2012; 2016) has advocated an alternative ‘deep organising’ approach that utilises external professional union organisers to identify, train, coach and mentor rank-and-file ‘*organic leaders*’ - who may hold no elected position and not self-identify as leaders but are respected figures enjoying natural influence with their workplace peers, and who can play a key role in inspiring and mobilising the mass of workers into action. Yet quite apart from assuming the specific art of union organising is predicated on the expertise of union staff, McAlevey is far too dismissive of the way in which already committed activists with their broad union aspirations can often be important to the process of framing grievances in ways that can create the opportunities for action - as

well as for 'organic leaders' to lead. Nonetheless such a model of union organising points to the way to in which *both* figures can play crucial overlapping leadership roles.

What this suggests is the need to recognise the way in which even though union reps/activist leadership can be a key factor in contributing to the collectivisation of workers' discrete experiences and aspirations in forms which can encourage united organisation and activity, 'ordinary' rank-and-file members (including 'organic leaders') can themselves put pressure, and set limits, on reps/activist leadership (Beale, 2003; Beynon, 1973; Darlington, 1994; 2002; Lane, 1974). In other words, the 'leadership' relationship can be seen as a reciprocal interaction between reps/activists and members that requires – beyond Kelly's limited theorisation of such processes – consideration of attempts made by reps/activists to influence members, but also of members' expectations and attempts to influence reps/activists.

Barker et al. (2001: 5-11) have offered a valuable analytical framework for understanding the nature of leadership, which views it as simultaneously a 'purposive activity' and a 'relationship'. Considered as a *purposive* activity, leadership involves engaging in practical theorisation and evaluation of concrete situations and then providing practical directive proposals about appropriate forms of collective organisation and action. But leadership also involves 'listening' to workers as well as talking, anticipating responses as well as making proposals. Leadership can be understood to be a dynamic activity with other actors, who themselves are strategically thinking entities, possessing 'agency'.

From this perspective, rank-and-file union members can often *themselves* play a crucial role in translating grievances into a sense of injustice, blaming management, and encouraging collective forms of activity aimed at protecting workers' immediate interests. This involves a process of discussion and argument with reps/activists as to what specific grievances to highlight and demands to formulate, and the degree of support they might expect. While reps/activists can often be initiatory, they are so only in relation to rank-and-file workers themselves, with questions of strategy and tactics an inherently relational activity and always necessarily provisional, subject to revision and to argument. Listeners are *as significant* participants as speakers in a transforming process of social dialogue. While leaders (reps, activists, 'organic leaders' or other 'ordinary' union members) can make

directive suggestions, they have to compete with other aspiring leaders and combat alternative conceptions of what should be done. Thus all leadership relations can be seen to inevitably involve a degree of tension between would-be-leaders and potential 'followers', with both differentiated by levels of commitment, consciousness and influence.

However, while it is important to broaden our conception of leadership, it does not necessarily follow – if we want to retain any analytic meaning for the concept - that we should completely collapse the distinction between activists/leaders and union members, and ignore the differential structure, authority and influence of leadership that can sometimes be significant.

## **Limitations**

We can now turn to two critical limitations that can be identified with Kelly's approach.

### *Union member/bureaucracy dynamic*

First, Kelly's leadership component of mobilisation theory does not adequately integrate an analysis of either the potentially conflicting priorities/interests between union members and full-time national/local union officers (despite some previous work on the subject: Kelly, 1988; Kelly and Heery, 2004), or the role of senior lay workplace reps who operate between the mass of members and union officialdom, and the ways in which both these sets of intra-union relations can impact on the limits/potential for workplace collective mobilisation, either contributing to its facilitation or to its hindrance and limited manifestation (Darlington and Upchurch, 2012).

While union leadership from outside the workplace by full-time union officers necessarily lacks the direct and day-to-day contact and presence that lay workplace union reps/activist often have, it can still potentially contribute to the strategic union orientation, capacity and willingness of workers within and across different workplaces to engage in collective action. For example, inside the RMT, as well as the large milieu of combative lay workplace reps/activists who have helped to encourage collective action, Bob Crow (its left-



wing general secretary 2002-14) played an important part in transforming the union, stamping his oppositionist leadership style towards the employers and government and helping to shape strategic and tactical issues, with a consistent stress on so-called 'old-fashioned' virtues of collectivism, resistance and activism. Even though not involved in all disputes directly, his influence was evident in providing activists with an organisational culture that bestowed legitimacy on developing militant interests, goals and means, and in helping to generate the confidence of members to undertake collective action (Darlington, 2009b; Gall, 2017: 232). Other national (and regional) union officers and lay national executive members also provided such support.

Yet in different contexts there can also be a conflict of priorities/interests between reps, activists and members, on the one hand, and full-time national union officers, on the other, which may mean that collective action is effectively opposed or stymied from above with ramifications for workplace union mobilisation capacity. Beale's (2003: 91) study of workplace union militancy in Royal Mail documented significant tensions between the national leadership and rank-and-file members, with workplace unionism often successfully confronting management regardless of support from the national leadership of the union who 'generally attempted to contain or discourage workplace militancy' (p. 93). Similarly, Taylor and Bain's (2003: 166) study of Excell reported that mobilisation was increasingly characterised by the frequent clash of competing priorities, with the adversarial approach of workplace union activists and members colliding with the national officer's desire for a moderation of demands that avoiding jeopardising the union's attempt to negotiate some form of national union recognition agreement at the company's client firm. Taylor and Bain argued that 'fuller attention needs to be taken of the ways in which strategies adopted by unions at national level can conflict with, and stifle, organising activities generated in the workplace, leading to the phenomenon of dissipated mobilisation' (p. 171).

In other words, the classical Marxist analysis of the contradictory nature of bureaucratic trade union officialdom – balancing between the pressures of their members on the one hand, and employers and government on the other - can be seen to provide an important additional dimension to Kelly's conceptualisation of the role of union leadership in mobilising workers that needs to be considered and potentially integrated. While on

occasions and in certain contexts full-time national union officers can galvanise workers' militancy alongside shop-floor union activists in a way that can be absolutely central to the instigation, nature and outcome of strike activity, they are also subject to powerful bureaucratic and moderating pressures to 'keep faith' with their negotiating partners and to limit workers' struggles in ways that can be detrimental to rank-and-file interests and aspirations (Hyman, 1975; Darlington and Upchurch, 2012).

However, as Hyman (1989: 158) identified, the problem of bureaucracy is not only rooted in the interests of a specific layer of full-time national union officers, but a set of social relationships that permeate the whole practice of trade unionism, notably involving a 'semi-bureaucracy' of senior 'lay' union reps that operate between the mass of members and officialdom and who display similar ambiguous features to those of national officers, including sometimes a disinclination towards membership mobilisation and strike activity. Thus as Carter et al's (2012) study of PCS union responses to the introduction of lean techniques into HM's Revenue and Customs revealed, while national full-time officers (notwithstanding the control of the union by an organised left-wing tendency) came into conflict with the direct wishes of a militant membership whose calls for national action in opposition to the implementation of lean methods were largely ignored, a network of union branch officials aligned with the national leadership also played a contributory (if uneven) role in frustrating rank-and-file demands for strike action. On the other hand it should be noted that workplace-based union reps generally, despite their sometimes full-time status, are also subject to a number of direct counter-pressures and informal workplace sanctions to those acting towards bureaucratisation and conservatism, such that they can be qualitatively different from national officers in their potential responsiveness to rank-and-file members' aspirations (Darlington and Upchurch, 2012).

In sum, because trade union organisations have their own internal dynamics and relationships between different constituent parts, characterised as much by centralised and bureaucratic structures as by counter-tendencies towards democracy and accountability, the ways in which national and local union leaders' attitudes and behaviour and those of the wider membership interact, overlap and conflict, inevitably can have important ramifications for workplace union mobilising capacity and the leadership of collective action

- considerations that Kelly's leadership component of mobilisation theory does not sufficiently explore.

### *Left-wing political leadership*

A second limitation is the inadequate consideration of the role of left-wing political leadership in the process of mobilisation. It is true Kelly's conceptualisation of workers' collective agency pointed to the way in which the advocacy of 'injustice' and need to engage in collective action can be shaped and enhanced by leaders and activists whose individual motivations go beyond instrumentality to be informed to a greater or lesser extent by broader ideological and political frameworks that embrace notions of exploitation, inequality and class power within capitalist society. Despite acknowledgement (Kelly, 1988, 52-54; see also 1996a and 2000) of the potentially central role of specifically left-wing political activists – for example, those in the British Communist Party in the 1960s and 1970s – this feature was undeveloped and explored. Many industrial relations researchers historically, in an attempt to refute the right-wing 'agitator theory' of strikes, have also often considerably underestimated the influence of left-wing union reps/activists in strike activity (Darlington, 2002; 2006). Only a few studies have explicitly explored how the political inclination of reps/activists can sometimes be an influential factor shaping the dynamics of mobilisation (for example, Calveley and Healy, 2003; McIlroy and Campbell, 1999).

Yet studies of the RMT's distinctive form of militant and politicised trade unionism over the last 20 years (Connolly and Darlington, 2012; Darlington, 2009a; 2009b; 2012; 2013) have identified a large milieu of assertive and combative national union officers, local reps and activists (embracing members of radical left parties, left-wing members of the Labour Party, and independent quasi-syndicalist activists) who hold fairly explicit 'left' political values, ideology, motivation and commitment. Such figures have played a very influential leadership role in encouraging the union's repeated mobilisation of members through strike action, with an explicit rejection of alternative 'social partnership' and accommodative forms of unionism. They have also provided an intensely *ideological and political cutting-edge* to such industrial militancy. Such left-wing leaders and activists have

been motivated not just by perceived workplace injustice, but also by the search for social justice outside the workplace, and have often framed issues with a highly political discourse pivoted on a traditional class-based analysis of society and the need to defend the interests of the wider working class movement. Vigorous opposition not only to neoliberalism, but also social democratic attempts to construct a 'dented shield' with neoliberalism were evident in the union's 2003 decision to break its historic link with the Labour Party and subsequent willingness to support electoral candidates from alternative left-wing formations outside Labour, and more recently to back Jeremy Corbyn's leadership within the party.

No doubt the political economy context of the railway and Underground sectors (including privatisation, deregulation and restructuring) has contributed to the politicisation of industrial relations, and encouraged workers' discontent and its manifestation in militant forms of strike mobilisation and left-wing political orientation and leadership. Thus left-wing leadership has been shaped by ideological and practical factors, by (subjective) 'strategic choice' and broader (objective) environmental contextual influences. But the combination of high 'structural power' (through bargaining position) and 'associational power' (through membership density and occupational identity) (Silver, 2003) could well have remained dormant without the accompanying political leadership that has exploited such 'opportunity structures'. In this respect the RMT has been emblematic of a minority, 'radical political unionism' trend (Upchurch, et al., 2014) within some European countries over recent years, focused on militant class struggle and engagement in social and politicised activity beyond the workplace (Connolly et al., 2014). Of course the political influence of left-wing activists amongst the *mass* of workers in the RMT (or any other union), in a context where the forces of the left have been in decline for years, should not be exaggerated (McIlroy, 2012). Nonetheless, it would be valuable, as Kelly (1998; 2000; 2005a) has acknowledged, for their role in workplaces and unions to be the subject of further research.

While the importance of the internal politics of trade unions, and in particular the ideological and political factional struggles waged between left and right-wing forces for supremacy in unions' policy making bodies and its impact for the leadership of different unions, is briefly commented upon by Kelly, there is no real examination of such factors or

attempt to integrate such broader features into the analysis of how workplace mobilisation can be influenced. Yet the difference between leadership strategies based on union militancy, as opposed to social partnership, can have a potentially significant impact on the willingness of workers to engage in strikes, as well as other outcomes related to the defence/advancement of workers' interests and vitality of union organisation (Kelly, 1996b). On this basis, left-wing political challenges aimed at transforming unions into organisations that can mobilise workers can be of as much significance as the battle against employers. Even so, as previously noted, Carter et al's (2012) study also underlines the way that left-wing national union officers, and other office holders, notably senior workplace reps, are not immune from in-built structural bureaucratic and conservative pressures, such that they can sometimes be just as capable of holding back workers' struggles as their more moderate or right-wing counterparts.

### **Refinement and Development**

In conclusion, Kelly's vantage point of analysis integrates and gives equal consideration to objective and subjective (structure and agency) factors and their interplay. It is anchored in a range of specific contextual and contingent material factors that serve as provocations and resources for collective mobilisation, as well as the role of union leadership whose influence helps to collectivise workers' discrete experiences and aspirations in forms that directly encourage combativity. While this is not an easy balance to achieve, the strength of Kelly's take on the role of leadership within mobilisation theory is that it attempts to locate the process of leadership within a multi-factorial framework that requires an assessment of different workplace contexts, opportunity structures and leadership capacities conducive to collective action. Despite its hitherto limited operationalisation within the field of industrial relations, and some tensions and limitations to the conceptualisation, Kelly's approach makes a distinctive and valuable contribution to understanding the dynamics of collective action that remains relevant 20 years after publication.

At the same time, the study of the mechanisms and processes of how leadership can influence the emergence and development of collective mobilisation needs further analytical refinement and development, as well as empirical investigation, which utilises but goes beyond Kelly's work. An important feature Kelly did not really explore was the different

leadership styles that can be adopted (Ganz, 2000; 2010), reflecting the variety of choices and wide array of complex activities inherent in strategising, engaging in decision making and helping to initiate or direct collective mobilisation. One noteworthy study of union organising by Cregan et al. (2009) has extended Kelly's social identity framework to suggest there is a direct relationship between the 'transformational leadership' qualities of workplace union reps and the social identification and collectivism of members. Such leaders encourage the local membership by charismatic, idealised behaviour, urging fellow workers into struggle by inspirational example, and developing union solidarity and wider notions of social justice which helps to transform or change members and thereby the union itself. Further empirical research on such transformative leadership, alongside other styles – taking due account of structural contexts - could valuably contribute to developing Kelly's leadership dimension of mobilisation theory.

As we have seen, future research also needs to move beyond Kelly's focus on individual 'leaders' somewhat detached from the broader range of membership constituents they wish to lead. Leadership is something that has to be conceptualised in *dynamic* and *relational* terms – developing and changing in response to, and as a means of shaping, both *external* and *internal* processes. It underlines the need for industrial relations researchers to explore why, and within what limits, workers agree to visions and practical suggestions articulated by 'leaders', as well as how 'followers' are themselves involved in the process of framing and generating collective action, thereby both displaying leadership behaviour as well as influencing 'leaders' own role and style. Likewise, it suggests more attention needs to be focused on the discussions, debates and arguments involved in deciding what are the most appropriate ways of framing issues around which workers can be mobilised, including different conceptions between leaders, reps/activists and members.

Meanwhile, as Blyton and Jenkins (2012: 3) have pointed out, Kelly's focus on workplace-based activist leadership in framing injustice as a collective grievance undervalues the significance of the linkages and interaction with *externally* based social networks and sources of influence and pressure. Yet no matter how strong workplace union leadership organisation may be, and however collective action begins, the capacity to develop and sustain a collective action frame with any chance of success often requires

support from broader bodies such as trade unions, intra-union activist networks, community groups, social movement bodies, politicians and the media (Milkman, 2016; Turner, 2006). This suggests links with other actors and networks, as well as the extent and ways in which workplace leaders/activists push in the direction of 'social movement unionism' – for example, public sector unions linking the need for increased staffing levels and good workplace conditions to the broader political championing of public service standards (Carter and Kline, 2017; McAlevey, 2012), and unions generally attempting to harness the power of workers' relationships *outside* the workplace as well as *inside* the workplace in a form of 'whole worker organising' (McAlevey, 2012; 2016) - would benefit further development from a mobilisation theory vantage point of analysis.

Finally, there is the extent to which mobilisation theory with direct relevance to its leadership dimension can contribute to understanding the *absence* of collective action in many workplaces. Gall (2000: 105; 2011: 621) and Heery (2003: 296) have argued that while the interaction between the specificity of contingent social processes involving worker agency and the material foundations of concrete circumstances provides crucial analytical purchase in explaining why collective action can take place, it does not necessarily explain why it is that in workplaces where there are evident grievances, a relatively favourable opportunity structure and bargaining leverage context to act, *and* the presence of a significant mobilising leadership amongst union activists, collective action has been either rejected or not acted upon. This is likely to relate to workers' assessment of their situation and their perceived view of the appropriateness, feasibility and effectiveness of collective action in bringing leverage over their employer in terms of a cost–benefit calculation. This could be linked to workers' low self-confidence in an overall climate in which strike levels, for example in the UK, are at historic low levels, there is the legacy of workers' defeats, and where the 'demonstration effect' of successful action has been noticeable by its absence (Gall, 1999; 2000; 2001; Joyce, 2015). Another contributory factor is the way in which national union leaderships have often been unwilling to encourage workers' struggles, either because they do not believe strike action can win concessions or because they pessimistically assume workers are not prepared to fight. This suggests the need to develop Kelly's approach by studying examples of where such conditions have existed. At the same time studies of militant collective action taken by vulnerable and poorly organised workers

(such as at the gig economy Deliveroo cycle delivery company in the UK in 2016) whose leaders have displayed 'strategic capacity' in their mobilisation, despite an apparent unfavourable opportunity structure (as in Ganz's (2000) study), could also make an important contribution to the analytical purchase of mobilisation theory.

Nonetheless, Kelly's work signals how the very low levels of collective action evident in many industrialised countries may be connected to the *quantity* and *quality* of lay activists and leaders that exist inside workplaces and unions. The huge decline in the number of workplace reps in the UK over the last 30 years (alongside union membership levels), increasing lack of reps' organisation within many public sector workplaces, lacklustre willingness of many national union leaderships to actively promote reps' organisation, ageing profile of existing reps, and pressures towards reps' bureaucratisation, as well as immense difficulties caused by employer counter-mobilisation involving disciplinary sanctions and victimisation (Kelly, 1998: 56; 44; Taylor and Bain, 2003: 171), has inevitably undermined reps/activists' capacity and willingness to encourage and lead collective action. Likewise, the extent to which existing reps/activists have the skills (or 'social capital') to engender, encourage and sustain wider activism against the backdrop of a long-term undermining of the strength and vitality of workplace union organisation is also important (Gall and Fiorito, 2012: 724-5). All this suggests the need, from a Kelly-type analysis, for more in-depth research into the current state of workplace union reps' organisation and activity (Joyce, 2016) and of its limits and potential to encourage collective mobilisation.

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