Social Movement Unionism or Social Justice Unionism? Disentangling Theoretical Confusion within the Global Labor Movement

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Abstract

After the election of John Sweeney as President of the AFL-CIO in October 1995, activists and supportive intellectuals in the United States began thinking about how to revitalize the almost moribund American labor movement. A key part of this literature has revolved around the concept of "social movement unionism." This term touched a nerve, and has garnered widespread usage in North America over the past two decades.

However, most researchers using this term have no idea that it was initially developed to understand the new unionism developed by members of specific labor movements in Brazil, the Philippines and South Africa, a type of unionism *qualitatively different* from that found in North America. This paper argues that the term "social movement unionism" should be confined only to labor organizations developing the same type of unionism, wherever in the world such should be found.

Accordingly, this concept should *not* be utilized in North America today as there are no labor centers or unions present that are developing this type of trade unionism.

It is important to clarify this confusion because it is leads to incorrect understandings and miscommunication. Accordingly, the current situation—whereby the same term is used to refer to two qualitatively different social phenomena —theoretically works against efforts to build global labor solidarity.

What about the progressive, broad-scope unionism emerging in North America over the past two decades? Taking a page from labor history, this article argues that the proper precedent is progressive unionism developed by the United Packinghouse Workers of America, CIO, and others, and therefore should be referred to as "social justice unionism." An Appendix provides a measurement tool. The argument is empirically grounded and theoretically developed, allowing us to better understand trade unionism around the globe.

Keywords

Social movement unionism, social justice unionism, global labor solidarity, labor theory

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From the vantage point of the workers themselves, the struggle to achieve freedom of combination has been waged not only to gain protection and improvement of the terms and conditions of labor, but also to attain social justice and full equality in civil society where, as individuals, workers could not adequately contend with the power of employers and the state (Bonnell, 1983: 3).

After the election of John Sweeney as President of the AFL-CIO (American Federation of Labor-Congress of Industrial Organizations) in October 1995—the result of the first democratic election for the presidency in the 40 years of the AFL-CIO—labor activists and supportive intellectuals in the United States began thinking about how to revitalize the almost moribund American labor movement (see Fletcher and Gapasin, 2008).[1] The resulting literature on labor revitalization is broad, and includes current issues as well as research on things US Labor may learn from a re-examination of some of its past. A key part of this literature revolves around the concept of "social movement unionism" and, as there appears to be somewhat of a "pause" in this part of the literature since about 2010, it is felt this is a good time to review development of this concept.

The term "social movement unionism" has been attracting increasingly greater attention by labor theorists and writers focusing on unionism in North America since 1994 (among them, Devinatz, 2008; Johnston, 1994; Moody, 1997; Nissen, 2003; Schiavone, 2004, 2007, 2008), as they have tried to describe the "new unionism" that has been emerging in particularly the US trade union movement.[2] Based on union member mobilization, social movement unionism is being projected positively and presented as the way that US Labor as a whole should develop in the early 21st Century. The term certainly seems to be resonating with activists, and is increasingly being used by researchers (see, among others, Fantasia and Voss, 2004; Lopez, 2004; Milkman, 2006; Milkman and Voss, eds., 2004; Nissen, 2003; Schiavone, 2004, 2007, 2008; Tattersall, 2009; see also Ross, 2008).

To support this understanding, some theorists (Johnston, 2001; Nissen, 2003; Robinson, 2002; Schiavone, 2008; and see Ross, 2008) have been trying to define more precisely the concept of "social movement unionism" (SMU) as developed in North America, and particularly in the United States. (See also Fairbrother, 2008; Fairbrother and Webster, 2008; and Waterman, 1993, 1999, 2004, 2008 for a more global focus.)

At the same time, a strong and vibrant section of the American Sociological Association (ASA) has developed since 1997, focusing attention on labor and labor movements. More and more of these labor researchers have been recognizing the global impact of labor, and how changes in the global economy have been affecting workers in North America and around the world. Thus, as interest in labor has expanded globally among sociologists—particularly through the International Sociological Association's research committee (RC) on labor, RC 44,[3] and its affiliated *Global Labour Journal*—an increasing number of ASA members since 2006 have been participating in RC 44. As American (and other) sociologists make these international ties, and become increasingly aware of labor around the globe (see Burowoy, 2009) and join in international discussions and debates, the necessity to understand similarities and differences between efforts to revitalize the Canadian and particularly the US labor movement and

innovative efforts in particular labor centers becomes all the more important, as does theoretically understanding these differences.

Accordingly, this paper challenges the usage of the term "social movement unionism" to refer to any current efforts in North America. The argument is that social movement unionism is a term developed for specific labor centers and unions that have been developing a qualitatively different type of trade unionism, and should be confined only to such labor organizations. While all labor centers that have developed this type of unionism to date have been located in the Global South—specifically CUT *(Central Única dos Trabalhadores*-Unified Workers' Central) of Brazil, KMU *(Kilusang Mayo Uno*-May First Movement) of the Philippines, and the Congress of South African Trade Unions (COSATU) of that country[4]—this is not a concept that is limited to that area; this is a concept that can be applied anywhere in the world to labor centers and unions that are developing this new type of trade unionism.[5] As explained herein, however, this concept should *not* be utilized in North America today, as there are no labor centers or unions present that are developing this type of trade unionism.

It is important to clarify this confusion because it is leads to incorrect understandings and miscommunication. Accordingly, the current situation—whereby the same term is used to refer to two qualitatively different social phenomena[6]—works against efforts to build global labor solidarity.

The conceptualization of social movement unionism was based initially on empirical research and political involvement in and around the specific labor centers mentioned above in three "third world" countries in the 1970s, '80s and early '90s and, as discussed below, this type of trade unionism was and still is qualitatively different from the type found to date in North America.

However, current writings suggest most of the North American-focused theorists and writers are not aware of this earlier work and, if they are, that they have relied on a truncated interpretation of this. Accordingly, this discussion has become terribly confused,[7] and threatens to lose the considerable benefits of research to date; this paper is an effort to clarify the considerable confusion around this concept and to preclude such losses, while suggesting a theoretically-derived process to move forward in our understandings regarding progressive trade unionism in North America.

Part of the confusion has developed because key researchers who developed the earlier conceptualizations have shifted their foci from the subject at hand, leaving a vacuum in the discussion. Two sets of the key writers who initially worked to develop the concept of social movement unionism (SMU)—Peter Waterman and Rob Lambert/Eddie Webster—have traveled subsequently in different directions, but yet have remained close enough to their original positions so as to suggest that they are still writing consistently from where they began. Another, this author, after contributing two articles to the debate in 1992 and publishing an internet-based article in 2001, has been focusing subsequently on other subjects—most importantly, the AFL-CIO's foreign policy program (see Scipes, 2010a, b, 2012). The long and short of this is that there has been no long-term, internationally consistent development of SMU. By returning to this discussion, I hope to contribute to rectifying this problem, disentangling the confusion and

suggesting theoretically-developed ways forward for unions and labor scholars.

As will be explicated below, there are currently three sets of writers who each use the rubric of social movement unionism in one way or the other: those writing on contemporary unionism in North America, especially those stimulated directly or indirectly by the work of Kim Moody; those writing initially in regards to the new unions and labor organizations that emerged in the 1970s through the mid-'80s in the Global South, and subsequent theorization based on experiences of certain "southern" organizations; and then subsequent writings by early theorists who have gone in different directions without explicitly noting their respective changes in direction.

This creates the basis for a great deal of confusion among labor theorists and writers, as well as trade unionists: people coming from different perspectives can use the exact same term to describe completely different things—and without even knowing it. This is not a firm basis from which to increase our knowledge about Labor around the world, nor a viable means by which to build global labor solidarity (Scipes, 2014a), nor a grounded way to develop theory to understand these developments.[8]

Along with the practical ramifications of the lack of clarity, however, there are theoretical implications as well. "Social movement unionism" in North America—as well as "social unionism" (see Ross, 2008)—has not been placed within a global theoretical context, while the conceptualization of social movement unionism developed in regards to these three specific labor centers has been so placed. Thus, by attributing the term "social movement unionism" to developments in labor in North America, theorists are, in fact, replacing a more theoretically developed conceptualization with one less so, and without even knowing this is being done.

All of these varied conceptualizations have been published in books and articles around the world, with many of the sources being unknown or undiscovered by subsequent researchers. Others have inappropriately "mixed and matched" research findings, leading to more uncertainty. Substantive contributions have been ignored. Simply put, the understandings created to date have created a "goulash" that is theoretically immature, and global diffusion of this "discussion" has also contributed to the confusion.

It is argued that this situation needs first to be recognized, and then to be disentangled. This paper seeks to connect a number of issues that heretofore have been generally approached separately in an effort to clarify what is meant by social movement unionism. This is done through two parts, with the first one based on empirical studies, while the second is empirically-based but theoretically-focused.

This paper begins with an empirically-based discussion of social movement unionism, which is where the bulk of attention is paid. This first part, in turn, is in divided into three sections. The first section provides a quick overview of the adoption and development of the term social movement unionism in North America in regard to North American (US and Canadian) trade unionism.[9] In the second section, readers are introduced to an international theoretical discussion and debate concerning the new unions (organized into labor centers) that emerged within several developing countries during the late 1970s-mid 1980s, and then how

theorists in this "tradition" have subsequently developed this conceptualization. In the third section of the first part, the social movement unionism that emerged in three labor centers located in three different developing countries is shown to be qualitatively different from the type of unionism that currently exists in North America, and it is argued that these two qualitative different types of unionism should be recognized as such and distinguished by different terminology. Accordingly, a theoretically-based taxonomy of types of trade unionism is advanced.

The second part of this paper interjects a term, "social justice unionism," into the discussion. It does this by presenting a theoretical model that is intended to overcome the currently existing confusion regarding North American trade unionism, suggesting how theorists can address the problem. This is to untangle the concept and provide theoretical clarity from which further work can develop.

The theoretical model advanced herein, based on *sets of practices,* suggests that there are two levels of trade unionism: *types* of unionism and then *forms* (or subsets of the types) of unionism.[10] Accordingly, it is argued that trade unionism around the world can be categorized into three *types:* economic, political, and social movement unionism. Further, it is suggested that each type of trade unionism can be subdivided into different *forms*.

To anticipate the argument in the second part of this paper, two forms (subsets) of the economic type of trade unionism are identified: "business" and "social justice" unionism.[11] In order to illustrate the difference between the two forms of business and social justice unionism, a comparative-historical empirical study previously conducted by this author is utilized, examining the different (and competing) forms of economic trade unionism that developed within Chicago's steel and meatpacking industries between 1933-1955 to establish theoretically the concept of trade union "forms" (Scipes, 2003). Utilizing this earlier study, it is argued, provides needed guidance. From consideration of this study, it is argued that the *social justice unionism* form of the economic type of trade unionism, as developed by the United Packinghouse Workers of America (UPWA) and a few others during the 1930s and '40 is, in fact, the precedent for the current "social movement unionism" in North America.

This suggests ways to proceed. It suggests that *social movement unionism* be retained as a term to describe a specific type of trade unionism created by particular labor centers that so far have existed in only certain countries in the Global South.[12] Further, it suggests that the term "social movement unionism" (along with "social unionism") in regards to North American unionism be dropped, and be replaced with the term *social justice unionism*. This would allow researchers/theorists to recognize relatively recent developments in trade unionism in North America (and other countries) and to properly situate them theoretically, while no longer ignoring or confusing North American developments with the particular type of trade unionism found in specific labor centers in certain developing countries. Finally, by incorporating this dispersed literature into this paper, it is hoped that subsequent scholars may cover the field more accurately and completely. Accordingly, this paper seeks to make a major contribution towards resolving both the practical and theoretical confusion that currently exists, whether it is recognized or not.

Part I: Social Movement Unionism

We begin this study with an empirically–based discussion of social movement unionism, and follow it by advancing a theoretically-based taxonomy of global trade unionism.

1. Empirical Research

This section discusses the concept of social movement unionism in both North America, and among particular labor centers that have developed in the "Global South." It first discusses the definition of SMU in North America, notes how it developed, and how it has been applied subsequently. From there, focus is shifted to the initial theoretical work on SMU that emerged from studies of particular labor centers in the Global South. And through these processes, it shows the qualitative differences between these two social phenomena.

Based on these discussions, it shows that the same term has been applied to two qualitatively different social phenomena, and argues that a different terminology is needed to distinguish between each of the two phenomena.

A. Social Movement Unionism (SMU) in North America

Kim Moody, in his 1997 book *Workers in a Lean World,* was the first to popularize SMU in North America.[13] He offered "social movement unionism" as a positive alternative to the traditional "business unionism" that has for so long been dominant with the US labor movement. Moody defined SMU as:

> Social movement unionism is one that is deeply democratic, as that is the best way to mobilize the strength of numbers in order to apply maximum economic leverage. It is militant in collective bargaining in the belief that retreat anywhere only leads to more retreats—an injury to one is an injury to all. It seeks to craft bargaining demands that create more jobs and aid the whole class. It fights for power and organization in the workplace or on the job in the realization that it is there that the greatest leverage exists, when properly applied. It is political by acting independently of the retreating parties of liberalism and social democracy, whatever the relation of the unions with such parties. It multiplies the political and social power by reaching out to other sectors of the class, be they other unions, neighborhood-based organizations, or other social movements. It fights for all the oppressed and enhances its own power by doing so (Moody, 1997: 4-5).[14]

And Moody correctly—though in too limited a manner—attributes SMU to the new unions of Brazil and South Africa (Moody, 1997: 205).[15]

It is to the work on the unions of Brazil and South Africa that we must turn for the origins of this term. Moody, as he recounts (Moody, 1997: 208-212), relied for much of his knowledge about unions in these countries on the work of Gay Seidman (1994). Seidman, in a very innovative monograph, compared the development of labor centers CUT *(Central Única dos Trabalhadores)* in Brazil and COSATU (Congress of South African Trade Unions) within their

common context of rapidly industrializing countries, providing the understanding of social movement unionism from which Moody developed his thinking.

According to Seidman, "Theoretically, social movement unionism is perhaps best defined as an effort to raise the living standards of the working class as a whole, rather than to protect individually defined interests of union members" (Seidman, 1994: 2). She amplifies a little further, but it can be summed up as seeing SMU as being more than just the workplace-focused and institutionally-defined forms of trade unionism that has been present among so much of the labor movement around the world. Seidman further notes, after writing about unions joining campaigns for community-based issues such as housing, health care and running water, that "These campaigns link factory-based unions and communities, and *they lead to challenges to states* as well as to individual employers" (emphasis added) (Seidman, 1994: 3).[16]

What does "challenges to states" mean in day-to-day reality? It means these unions were challenging the anti-democratic dominance of the state by the elites and their allies, and the *systematic* propagation of policies and operations that were intended to hinder if not attack the well-being of working people (including peasants, women, and the urban poor) of their respective countries. Key to this challenge was the establishment and development of member-run, popular democratic and militant trade unions and pro-people organizations. These organizations, in turn, focused resistance against employers, contractors, contractors and urban police, against the elite-based state itself and, at best, suggested radical alternatives to the current social order for the benefit of all working women and men.

Moody's definition of SMU, therefore, comes out of developing countries (specifically Brazil and South Africa) but already in an attenuated version: where Seidman specifically included "challenges to states" in her discussion, Moody did not.[17] Moody suggested good things, but challenging the state is clearly not in his definition. This is an important point, however: the trade unionism that emerged in labor centers in several developing countries in the 1970s and '80s—and the KMU should be included in the mix as well (Lambert, 1990; Scipes, 1992a, b, 1996, 2001; West, 1997) —specifically and consciously challenged the existence of the state (specifically, the dictatorships that controlled each of these respective countries), the entire established social order of each country,[18] and the global political-economic-cultural networks in which their respective countries were enmeshed.[19]

Despite this attenuated version of SMU—an attenuation that most theorists and writers are not aware of—Moody's terminology has resonated in North America and has expanded greatly. A wide variety of authors have used the term, including (among others) Clawson, 2003; Devinatz, 2008; Dreiling and Robinson, 1998; Eimer, 1999; Fantasia and Voss, 2004; Huber and Luce, 2001; Johnston, 2001; Lopez, 2004; Milkman, 2006; Milkman and Voss, 2004; Nissen, 2003; Robinson, 2002; Ross, 2008; Schiavone, 2004, 2007, 2008; Sharpe, 2004; Turner and Hurd, 2001; Wilton and Cranford, 2002; Tattersall, 2009; and Voss and Sherman, 2000.[20]

The best effort to date to pull together this entire "school" of thought is Bruce Nissen's 2003 article in *Labor Studies Journal*. Nissen, in comparing "social movement" to what he calls "value added" unionism, gives an excellent overview of the SMU "school"—including a thorough bibliography to that point in time. He basically describes social movement unionism

theorists as arguing for the need to champion the issues of those oppressed by the US economic system; to require an internal transformation of unions; and to advocate increased union member mobilization (Nissen, 2003: 140-143). In short, those promoting the concept of social movement unionism in North America argue for a democratic, rank and file-led unionism that mobilizes their members to address not only issues of the union's (institutionalized) self-interest, but also issues within unions themselves, as well as the interests of all poor and working people in general, but *without challenging the existence of the current social order.* And these writers argue that it would be extremely desirable for the US labor movement to move further and faster toward this approach.[21]

However, there is one more set of scholars who have been influenced by Moody and are writing, and who deserve to be mentioned at this time; these scholars are trying to think out developments in unionism and social movements within Western Europe (see Dunn, 2007; Mathers, 2007; Upchurch, Taylor and Mathers, 2009; Upchurch and Mathers, 2012.)

Without going into details, and while their empirical work appears sound, there are considerable problems with these European theoretical efforts regarding unions. They show no awareness of the early debate about the Southern labor centers, and thus adopt Moody's conceptualization. They approach unions in South Africa, the US, and several Western European countries as though they developed according to similar processes, which they did not.[22] They privilege "class" and Marxist analysis (Upchurch and Mathers, 2012; Upchurch, Taylor and Mathers, 2009: 14-21); even when they provide no empirical evidence to support this position (see especially Mathers, 2007). They tend to focus on theory over empirical examples (see especially Dunn, 2007), even though sometimes raising excellent points. They over-emphasize the state and its institutionalization of labor, while under-emphasizing dynamics internal to unions (see Upchurch and Mathers, 2012). And they suggest the emergence of a new type of unionism "to the left" of traditional "social democratic trade unionism," which they call "radicalized political unionism," but which they never define (Upchurch, Taylor and Mathers, 2009: 168-174).[23]

With that understanding of the Moody-inspired version of social movement unionism, however, it is now time to consider the "other" version of social movement unionism, as it developed initially, *before* Moody, and as it has been developed subsequently.

B. Social Movement Unionism (SMU) by New Unions of the Global South

During the 1970s and '80s, a new type of trade unionism emerged among particular labor centers in several developing countries. The most advanced versions were the CUT in Brazil, KMU in the Philippines and COSATU in South Africa.[24] In each of these countries, these new labor centers were challenging employers, their respective state, and the global political-economic-cultural networks in which their countries were enmeshed.[25]

1. The Initial Debate

In the late 1980s and early 1990s, an international debate took place among scholars concerned with or interested in the new labor movements that had emerged in these three

countries (Scipes, 2000b; Von Holdt, 2002: 285-287; for the original arguments, see Waterman, 1988, 1991; Lambert and Webster, 1988; Scipes, 1992a, b; and for an early discussion of them, see Munck, 1988. See also Lambert, 1990; Scipes, 1996).[26] Attempting to take advantage of the then-emerging developments in social movement theory (Waterman, 1988), these scholars were trying to theoretically understand the new phenomenon, and therefore advanced the concept of "social movement unionism" to understand these new labor movements. Peter Waterman, a long-time labor scholar and writer who coined the term, wanted to ensure that this concept was theoretically developed so that it would be much more than merely a terminological substitute:

> I am concerned that the term be defined in such a way that it provides both a new theoretical tool and suggests a new political norm. In other words, that it be distinguished from both traditional terminologies and traditional practices (Waterman, 1988: 1).

Not surprisingly, the occasion of a new conceptualization yielded different understandings of what was meant by "social movement unionism," and the debate was an effort to refine the conceptualization for possible further generalization. The intention of this effort was to try to learn from the examples of the "advanced" labor movements of the late 20th Century so as to inform subsequent efforts, so this already-existing knowledge could hopefully be used to assist later-developing movements. However, unstated at the time but implicit in the methodology, was that by clarifying the understanding of these new labor movements and the social phenomena they represented, theorists could then reflect back on understandings of previously-existing unionism around the globe and hopefully further develop these understandings as well.

Rob Lambert and Eddie Webster, both of whom had been actively engaged in efforts to build the new, non-racial unions in South Africa, developed an argument in response to Waterman (1988), and presented a conceptualization of three types of trade unionism from their work on unions in South Africa: they called these "orthodox," "populist" and "political or social movement" types of trade unionism.[27] These types of unionism were conceptualized on the basis of sets of particular practices (Lambert and Webster, 1988: 20-21).

This author later followed, attempting to refine the thinking of Waterman and Lambert/Webster in two articles that were published in 1992:[28] the *Kasarinlan* article, in which the discussion was drawn out in detail and to the greatest extent (Scipes, 1992a), and the *Critical Sociology* article, which differentiated social movement unionism from Leninist approaches (Scipes, 1992b). As an American shopfloor worker (printing press operator), labor activist and researcher/writer, this author was not satisfied with the Lambert/Webster conceptualization, although it was seen as better than Waterman's effort. Assessing Lambert and Webster's work, an alternative conceptualization that surpassed their's was advanced. In this alternative, again based on specific sets of practices, it was argued that there were three types of trade unionism in the world: economic, political, and social movement unionism.

Economic trade unionism was defined as:

> ... unionism that accommodates itself to, and is absorbed by, the industrial

relations system of its particular country; which engages in political activities within the dominant political system for the well-being of its members and its institutional self but generally limits itself to immediate interests... (Scipes, 1992a: 126).

Political unionism was defined as:

... unionism that is dominated by or subordinated to a political party or state, to which the leaders give primary loyalty—and this includes both the Leninist and "radical nationalist" versions. This results in generally but not totally neglecting workplace issues for "larger" political issues (Scipes, 1992a: 127).

And then, after detailing the debate over "social movement unionism" (Scipes, 1992a: 127-133), this version of social movement unionism was defined as:

… a model of trade unionism that differs from the traditional forms of both economic and political unionism. This model sees workers' struggles as merely one of many efforts to qualitatively change society, and not either the only site for political struggle and social change or even the primary site. Therefore, it seeks alliances with other social movements on an equal basis, and tries to join them in practice when possible, both within the country and internationally.

       Social movement unionism is trade unionism democratically controlled by the membership and not by any external organization, which recognizes that the struggles for control over workers' daily work life, pay and conditions is intimately connected with and cannot be separated from the national socio-political-economic situation. This requires that struggles to improve the situation of workers confront the national situation—combining struggles against exploitation and oppression in the workplace with those confronting domination both external from and internal to the larger society—as well as any dominating relations within the unions themselves. Therefore, it is autonomous from capital, the state and political parties, setting its own agenda from its own particular perspective, yet willing to consider modifying its perspective on the basis of negotiations with the social movements [and political parties] with which it is allied with and which it has equal relations (Scipes, 1992a: 133).[29]

And this theoretical work was followed with a monograph on the KMU that attempted to use this conceptualization to understand an empirical study (Scipes, 1996).

To my knowledge, however, there has not been any direct responses to this conceptualization by the others in this initial debate, nor in whole by any other writers (Sluyter-Beltrão, 2010: 6, uses an attenuated version of my concept), although my work has been widely referenced, suggesting it is at least known by a number of writers who have tried to develop the concept. Neither Lambert nor Webster, together or individually, have responded directly to my conceptualization, positively or negatively, although Webster published an article discussing it in the newsletter of Research Committee 44 (Labor Movements) of the International Sociological Association (see Scipes, 2000b). Waterman (2004) *appears* to have responded to his

conceptualization if one just looks at the bibliography of this piece which, as Waterman notes (2004: 243), "includes items beyond those referred to in the text above." However, in the body of his paper, instead of confronting my conceptualization or accurately describing my work, Waterman accuses this author (along with Lambert) of "identification with" the KMU.[30] My conceptualization of SMU, as can be seen, does not fit into either of Waterman's "Class/Popular-Community" or "Class + New Social Movement" understandings (Waterman, 2004: 217-220) from which Waterman builds his argument.[31]

In short, by ignoring a serious contribution to the debate on social movement unionism instead of substantively addressing it, these theorists have, in turn, helped further confuse the debate.

And at the same time, these other authors have shifted their foci from the subject at hand, leaving a vacuum in the discussion, without substantially announcing their change in focus. Waterman shifted his writings from focusing on *sets of practices* of the new unions to reflecting on his experiences, joining this with his increased knowledge and learning from his previous theoretical work; thus, his work has shifted from focusing on sets of practices to *normative prescriptions* of how he thinks this new unionism *should* develop (see Waterman, 1993), and has subsequently tried to apply this globally in what he calls "new social unionism" (Waterman, 1999), and then later "new international social unionism" (Waterman, 2004, 2008).[32]

From writing an important article on social movement unionism together, Rob Lambert and Eddie Webster (1988) have shifted as well. Lambert (1990), in a strong article, applied the concept of social movement unionism to the KMU, but as far as is known, never did further research in the Philippines, and subsequently shifted to writing about SIGTUR (Southern Initiative on Globalization and Trade Union Rights)[33] and global social movement unionism. Webster, along with Lambert, has been writing about SIGTUR (Lambert and Webster, 2001; see Lambert, 2002), and has written about strategic unionism with others (see Joffe, Maller and Webster, 1995; for an evaluation of this concept from a case study in South Africa, see Von Holdt, 2003). Webster and Lambert, along with Andries Bezuidenhout (2008), conducted an innovative three-country study on the "white goods" industry. Webster, most recently, has returned to the SMU debate (with Peter Fairbrother), but without addressing many of the developments since he last published on the subject in 1988 (see Lambert and Webster, 1988; Fairbrother and Webster, 2008).

For those who know of Lambert and Webster's involvement in the early debate, as well as Waterman's, but who have not gone back to read their earlier writings, there is a tendency to assume they have been on a consistent path to develop the concept of social movement unionism, when they clearly have not.

2. Subsequent Debate and Development of Social Movement Unionism in regard to the Specific Labor Centers of the Global South (post 1992)

However, the general effort to develop the concept of social movement unionism in regards to this "new unionism" in the Global South has continued beyond the initial effort, particularly regarding unionism in South Africa, and has continued to be seen as a valid

perspective by a number of labor researchers (for South Africa, see Hirschsohn, 1998, 2007; Pillay, 2006: 169-172, 2013; Von Holdt, 2002, 2003; and see Barchiesi, 2007; Bramble, 2003; and Wood, 2003; and for Brazil, see Sluyter-Beltrão, 2010).[34]

In an article published in 1998, Philip Hirschsohn argues that COSATU (Congress of South African Trade Unions) exemplifies social movement unionism (Hirschsohn, 1998). Not surprisingly, but nonetheless, theoretically important, Hirschsohn builds on the earlier work on Brazil, the Philippines and South Africa. His work adds to the conception of social movement unionism:

> The existing literature of SMU either explains how or why the phenomenon has emerged and what distinguishes it from economic and political unionism, but fails to explain its organizational development systematically. Furthermore, there has been limited effort to integrate the rich [social movement] literature into the analysis of SMU. I adopt the political process approach to SMs to explain the origins, emergence, and development of SMU in South Africa (Hirschsohn, 1998: 634).

Unaware of Hirschsohn's research, yet trying to further develop my conceptualization of social movement unionism—and to critically test this conceptualization to see if was applicable outside of the Philippines—this author wrote a subsequent article that has only been published on the Internet, reducing its impact. In this article, it was argued that COSATU of South Africa also fit my conceptualization of social movement unionism—strengthening the validity of the conceptualization—at least up until 1992[35] (Scipes, 2001).

In other words, while not trying to put these labor movements into a theoretical straight-jacket—taking an activist-centered, but not determined, approach—this author argues that the workers in these specific labor centers in these particular developing countries collectively see themselves as actively trying to change the social order in which they are located as well as the global political-economic-cultural networks in which their respective countries are enmeshed.

Scipes argues that three criteria must be met before a labor center can be accurately described as embodying social movement unionism: (1) that this understanding of challenging the existing social order is at least the general understanding of workers and their leaders across the unions of the entire labor center; (2) that this understanding is developed and adopted through an interactive process between leaders, both formal and informal (i.e., activists), and worker-members; i.e., *that it is not imposed by the top-down by leaders on members;* and (3) that this understanding predominates within the unions that lead any particular labor center (Scipes, 2001). The level of understanding could go beyond that, and certainly any educational program developed from this perspective and carried out within the unions across the labor center would try to generalize this understanding among all members—the KMU, at least, has taken this approach in its educational program (see Scipes, 1986b, 1996).

In short, workers and leaders in unions that lead particular labor centers have come to a general understanding in which they see themselves as actively trying to change the social order in which they are located, as well as the global political-economic-cultural networks in which

their respective countries are enmeshed. Thus, these workers see themselves and their unions as being social change agents, but agents on behalf of themselves and their allies, and therefore *not* agents for external groups, such as a political party or a political candidate. They have collectively organized to change their world, with the help of allies at home and abroad, and to engage in mutual solidarity and support.

The discussion of social movement unionism has continued, with Karl von Holdt examining the development of SMU inside of a steel complex in South Africa, Highveld Steel. Here, Hirschsohn's plea for "systematic organizational development" gets met. In a carefully constructed monograph based on a case study,[36] Von Holdt defines social movement unionism

> as a highly mobilized form of unionism based in a substantial expansion of semi-skilled manufacturing work, which emerged in opposition to authoritarian regimes and repressive workplaces in the developing world. Social movement unionism is fiercely independent, but establishes alliances with community and political organizations. It demonstrates a commitment to internal democratic practices and to the broader democratic and socialist transformation of authoritarian societies (Von Holdt, 2003: 9).[37]

Von Holdt shows the erosion of social movement unionism during the period of transition to a post-apartheid society as NUMSA (the national union to which the metal workers' union at Highveld is affiliated) and COSATU shift towards "strategic unionism" wherein the union participates and engages in relations with both the state and management (Von Holdt, 2003: 305; see also Bramble, 2003, as well as Joffe, Maller and Webster, 1995).

The discussion of SMU has been supported, at least in part, by Geoffrey Wood's (2003) article on shop floor democracy in South Africa, and Sakhela Buhlungu's edited collection (2006) on "trade unions and democracy"—see, in particular, Devan Pillay's piece, pp. 169-172—as well as Hirschsohn's work in South African auto and clothing plants to support his earlier claims (Hirschsohn, 2007). Pillay's (2013) latest piece argues that COSATU exemplified SMU in the 1980s, but subsequently has returned to political unionism, although he also argues that the previous experiences of SMU have not been eradicated within COSATU, and that there remains the possibility that COSATU can against return to its social movement type of unionism.

These approaches differ still from the latest contributions by Peter Fairbrother, Peter Waterman and Edward Webster (Fairbrother and Webster, 2008; Fairbrother, 2008; Waterman, 2008). These three scholars, as part of an international scholarly forum, try to "think out" the concept of social movement unionism. Yet, while very much aware of struggles in the Global South, they make a mistake similar to that of Moody (1997), yet from the other side: they don't question the generalization of the concept to unions in both the Global North and South, nor do they distinguish between the different types of unionism in the Global South (see Collombat, 2011, for a comparative study that specifically addresses this). In other words, they think they can generalize the conceptualization, once the "true nature" of social movement unions is explicated, which they try to do.

Nonetheless, regardless of how well or how poorly they do, the fact remains that there are

a range of scholars who see the concept of social movement unionism as a vibrant concept, and one with enough "meat on the bones" to fight over. This author agrees. That is why it is so important to understand it on all levels—and to distinguish between what it is and is not.

C. Synopsis

There are three important points that must be recognized here. First is the *qualitative difference* between the *practices* of these particular labor centers in these developing countries and the practices of unions in North America. Specifically, specific labor centers in these developing countries—again, CUT, KMU, and COSATU—developed a type of trade unionism that consciously seeks to change the social order in which they are located, and the relations of their respective country with others.[38]

While nothing theoretically precludes any "developed country" union or labor center from consciously seeking to change the existing social order, the fact is that none of the contemporary unions in North America have been or are challenging the existing social order, nor are they challenging the global political-economic-cultural networks in which their countries are enmeshed. Some North American unions are, interestingly, beginning to challenge aspects of the neo-liberal regime—such as the Free Trade Agreement of the Americas (FTAA) and the shift of manufacturing to outside of the US—that directly affect them and their members,[39] but this is far from what has been developed by workers in these three specific labor centers. Thus, the qualitative differences in practices must be recognized, and terminology recognizing these qualitative differences must be adopted, so as to illuminate and distinguish between these different sets of practices.

Second, researchers on unions in the developing countries have continued to work from this social movement unionism framework when regarding these particular labor centers in these respective countries. Thus, this concept is established and remains useful theoretically, even if the proponents have not agreed upon one specific definition. Hopefully, this clarification of SMU will be seen as substantial, and that future scholars will use this in their work as they go forward.

And third, and following from the above, the different practices between these particular labor centers and progressive efforts in North America (and elsewhere) must be addressed on a theoretical level: it is not sufficient to understand them only at descriptive or analytical levels if we want to try to generalize findings from them to help guide developments of other labor centers and their affiliated unions. The trade union practices of social movement unionism-based labor centers are practices qualitatively different from other existing unions and labor centers, especially in the United States, and require a theoretical conceptualization that recognizes these differences.

And now that we have clarified the above, it is time to provide a theoretical understanding of trade unionism, and to locate efforts in North America in their proper "position."

2. Overcoming Theoretical Confusion

To overcome the theoretical confusion discussed above, it is useful to deploy a taxonomy of global trade unionism—encompassing economic, political, and social movement unions—which allows commentators to theoretically locate the unionism they are referring to by separate type (see particularly Scipes, 1992a, 2001). Thus, once located, hopes, expectations, and challenges can be more realistically addressed for that particular type of unionism—one can focus on specificities, rather than simply on general union aims.

It is argued that the types of trade unionism can be distinguished by variations regarding which forces determine organizational dynamics, the relations to the established industrial relations system of the country, and relationship of the labor center to country's social order:

Table 1: Types of Trade Unionism (based on sets of practices)[40]

	Economic	**Political**	**Social Movement**
Organizational dynamics determined by	Members	Subordinated to and/or subjugates itself to an "outside" political party	Members
Relationship to established industrial relations system of the county	Accommodates to established IR system	Challenges IR system until its political party gains political control, and then accommodates to it	Challenges IR system
Relationship to social order of the country	Accommodates to social order, although tries to improve situation of its members within such order	Challenges social order until its political party gains political control, and then accommodates to it—tries to improve situation of its members within such order	Challenges social order and international political-economic-social-cultural networks in which country is enmeshed. Builds counter-hegemonic political-economic-social-cultural power through location in production-distribution-exchange sphere of society; represents and fights for "larger" worker, urban poor and peasant interests; and demonstrates willingness to use such power to challenge established social order in conjunction with political allies, both domestic and internationally.

It seems, however, that delineating by type, while necessary, is not sufficient. Different sets of practices can be empirically distinguished between unionism types, but are there differences in union behavior *within* unionism types?

It is argued there *can* be qualitative differences in union behavior *within* union types,[41] and to delineate behaviors within types, this author has advanced the concept trade union "form": forms are different sets of practices *within* a particular type of trade unionism (Scipes, 2003). Thus, there are two different *levels* of trade union conceptualizations—"types" and "forms"— with forms being *subsets* of types.

Therefore, if *social movement unionism in North America* is not the same type as social movement unionism developed in these particular labor centers in certain developing countries, as established above, then what is it; how can it be understood? To understand these recent developments in North American unionism, a comparative-historical study specifically designed to establish theoretically the concept of trade union "forms" is discussed below, and the implications are helpful for today.

Part II: Social Justice Unionism

To try to resolve the question of just what *is* going on in North America—again, confining our comments to the US and Canada, but not Mexico—we suggest that the new unionism emerging in North America is not SMU, but rather one form of the economic type of trade unionism. Therefore, the term SMU should *not* be applied to labor centers or unions in North America to date, whose unionism is of a qualitatively different type.

The second part of this paper reports a study completed in 2003 that was designed to specifically see if it were possible to identify and delineate different "forms" of the economic type of trade unionism, and to theoretically distinguish them. It involves a naturalistic, historical-comparative study of union organizing in steel and meatpacking in the Chicago area as developed during the "CIO period," 1933-1955.

A. Steel and Packinghouse Unionism in the Chicago Area, 1933-1955

By examining the emergence and development of unions in the steel and packinghouse industries in the Chicago area between 1933-55 for my Ph.D. dissertation, this author sought to discover if these unions differed in how they addressed racial oppression in the union, workplace and community and, if so, how this could be theoretically explained (Scipes, 2003).[42]

To do this in light of the discussion in the first part of this paper, these unions had to be theoretically located. Economic trade unionism has been defined by this author as:

> ... unionism that accommodates itself to, and is absorbed by, the industrial relations system of its particular country; which engages in political activities within the dominant political system for the well-being of its members and its

institutional self but generally limits itself to immediate interests... (Scipes, 1992a: 126).

In this study from Chicago, it was specifically confirmed that both unions—Steel Workers Organizing Committee/United Steelworkers of America (SWOC/USWA) and Packinghouse Workers Organizing Committee/United Packinghouse Workers of America (PWOC/UPWA)—were of the economic type: both accepted the industrial relations system of the particular country (the United States), and both engaged in political activities within the dominant political system for the well-being of their members and their institutional selves— challenging neither the established social order, nor the legitimacy of the established industrial relations system. Neither union has been dominated by nor subjugated itself to an external organization (political unionism), nor did either try to challenge the dominant social order (social movement unionism). Accordingly, both unions were recognized as being representatives of the economic type of trade unions.

A naturalistic, historical-comparative study of two comparable trade unions was undertaken to see if two qualitatively different sets of practices (forms) could be delineated among these unions that were of the economic type of unionism, and if they could be theoretically differentiated. To do this, it looked at the development of two unions in fairly similar industries (regarding the process-nature of production)[43] and with similarities in workplace conditions (long hours, low pay, dangerous conditions) in the same area (the greater Chicago area, including Northwest Indiana), during the same time (1933-55), and with workers drawn from the exact same labor pool (white ethnic groups from Eastern and Southern Europe, African Americans from the rural southern US, and a smaller group of Mexican workers). This also meant that the workers shared the same general demographics and cultures: similar immigration origins and histories, same ethnic and racial compositions, same languages, same religious backgrounds, same cultures, same educational attainment, same skill levels, etc. In other words, the two unions were in industries more similar than generally expected, and their respective memberships were as similar as possible in a natural setting (Scipes, 2003: 45-50).

An issue was sought in which the two unions differed. How each union addressed the issue of racial oppression, in the workplace, the union, and the community was examined. A close examination showed that the unions radically differed: the packinghouse workers "aggressively tackled this social evil that had caused and was continuing to cause so much harm and hurt to its members, both workers of color and whites," while the steelworkers "either acquiesced to or actively collaborated in the continued existence of racial oppression" (Scipes, 2003: 343-344).

However, it was found that the unions not only qualitatively differed in how they addressed racial oppression, but they also differed qualitatively in the form of trade unionism that each had developed. And when the differences of approaches to racial oppression were explained, it was found that *the form of trade unionism developed determined whether or not each union would address racial oppression.*

B. Different Conceptualizations of Trade Unionism

This study from Chicago focuses on both internal factors and processes by which a union is constructed, and the results it has achieved; accordingly

> … its explanation differs from those who argue that structural position determines development, and [differs] from those who focus on the results of leadership differentiation and political struggles around institutional issues. It is argued that it is the collective identity suggested by activists, when negotiated and finally adopted by rank and file members, that creates an organizational collective identity (see Melucci, 1989, 1995). [From] this organizational collective identity, [members] establish the form of trade unionism chosen and this, in turn—by mediating members' understandings and actions—effects trade union activities in regard to other relationships; in this case, it is argued that the different forms of unionism effect how a union approaches working people's oppression in general, and in this project, racial oppression in the union, the workplace and in the local community (Scipes, 2003: 28).

Close examination of these two unions' respective development reveals qualitatively different ways of understanding unionism.[44] The argument is that a union's willingness to address the issue of racial oppression—as well as other non-economistic caused oppression, such as gender oppression—depends on the organizational form of trade unionism that it has developed—whether its members have adopted what is known as "business" or "social justice" unionism.[45] These forms of trade unionism are based on different conceptualizations of trade unionism, and the processes by which they are adopted, and are developed below.

While it is well known that, in general, members of the proletariat have different interests than do members of the bourgeoisie, and that these interests are antagonistic (Marx and Engels, 1978/1848), this does not necessarily hold in specific situations. Workers, as we know, can be opposed to their bosses; can ignore/disregard their bosses; can work with them; and/or a combination of these different approaches. And they can act in solidarity with other workers, ignore/disregard them, and work against them; and/or a combination of these different approaches. In short, we cannot assume that workers' general interest holds specifically, or at all times and all places (see Hodson, 1991).[46] Accordingly, by examining the social processes by which a group of workers construct their own organizations, we can see how they define their particular interests within specific situations.

This approach is supported on a theoretical level by Alberto Melucci's (1989, 1995) work on social movements. It is argued that Melucci provides guidance here for the establishment of trade unions and their amalgamated organizations, as he can, arguably, for any organization.[47] Melucci critiques most research on social movements because it assumes any social movement is an empirical reality; he argues that to understand a social movement, one must understand the *constitutive* processes by which any social movement emerges and develops (Melucci, 1989). Similarly, this author argues that it is the constitutive processes that determine how an organization emerges, which will effect subsequent developments. Key to this in regard to the

development of a trade union (or similar organizations) is the form of unionism chosen to guide subsequent development.

The form of trade unionism chosen is based on different conceptualizations of trade unionism. Both conceptualizations—business and social justice unionism—see unions as organizations created by workers and based in the production sphere of society, but one sees the unions taking a *narrow* approach, limiting its concerns and operations to benefit those groupings that are dominant within the union, and even sometimes at the expense of other working people ("business unionism"), while the other takes a *broad* approach, working for the well-being of their members and working people in general throughout society ("social justice unionism").

In my 2003 study, business unionism was formally defined as:

... one form of the economic type of trade unionism. While its internal decision-making processes can range from a top-down, results-oriented model to a bottom-up, process-oriented model, *its scope is narrow,* limiting its interests to those of the dominant members of the organization, and not necessarily to all members of the organization. These self-defined interests can be seen as separate from those of working people as a whole, and sometimes even opposed to this larger group interest. Because of this limited vision of trade unionism, business unionism depends on the ability of unions to win demands by themselves, or if they get the support of other organizations which adopt the business union's interests and goals as corresponding to their own, it is without the union making any commitment of reciprocation to its allies. It is a form of trade unionism ultimately based on individualism, albeit expressed in a collective manner (emphasis added) (Scipes, 2003: 373-374).

Social justice unionism was formally defined as another

... form of the economic type of trade unionism. While its internal decision-making processes can range from a top-down, results-oriented model to a bottom-up, process-oriented and democratic model, *its scope is broad,* seeing the necessity of addressing the needs and concerns of all its members, in the union, in the workplace and in the community. In short, these self-defined interests are integrated with those of working people as a whole. It builds support through solidarity with other people-focused organizations and projects, working in mutual efforts to improve the well-being of all concerned. It is a form of trade unionism ultimately based on collectivity and mutual respect (emphasis added) (Scipes, 2003: 375).[48]

The adoption of a particular conceptualization of unionism by any union at best is a product of a three-way interaction between members, activists (informal leaders) and formal leaders,[49] although obviously, once established, formal union leadership in some cases can encourage or hinder membership and/or activist involvement in such choice. In other words, the form of trade unionism chosen is more than just a product of the presence or absence of activists and their particular politics: activists *are* important, but how they are facilitated or constrained

by formal leaders is a factor, as is how the membership responds or does not respond to their ideas/activities/proposals, etc.

At the same time, this is a process critically affected by how collective decisions are made, whether inclusively from the bottom-upwards, or exclusively from the top-downwards: unions whose positions are based on inclusive rank-and-file participation and collective decision-making are more likely to have greater membership participation and maintain vibrant internal democracy than are unions that exclude rank-and-file members from decision-making processes (see Ross, 2008: 148-153). Further, support for any form of unionism based on inclusion and collective decision-making is much more likely to survive difficult times than those with exclusive decision-making.

This process is developed in detail elsewhere (Scipes, 2003). However, it is important to recognize that the steel workers' union adopted a business union (narrow) conceptualization of trade unionism early-on, while the packinghouse workers' union adopted a social justice (broad) conceptualization from the beginning.[50] These findings were developed after a close and extensive analysis of the development of each of these unions in the Chicago area across the period 1933-55 (Scipes, 2003: 139-314).

One final question remains: while these forms of trade unionism are obviously different, how can we make sure they are *qualitatively* different; i.e., how can we be sure the differences are significant? To address this question, in addition to a very detailed historical examination of the development of the respective unions—which showed these two unions were unquestionably different—this author developed a 30-point measurement scale to see if the differences were significant.[51] The measurement scale used business unionism as the referent, and required a union to get a minimum of 20 points out of 30 to be confirmed as a social justice union (Scipes, 2003: 412-415). The findings: "when measured across the years 1936-1954, the packinghouse workers' organizations in Chicago scored 29 out of a possible 30 points, while the steelworkers' organizations in the same region scored only two out of 30 points" (Scipes, 2003: 52).[52] The findings were deemed significant.

Accordingly, the argument herein is that the form of unionism based on a broad conceptualization of trade unionism (i.e., social justice unionism)—creates unions that are qualitatively more likely to address racial (and/or other) oppression than are unions based a narrow conceptualization of trade unionism (business unionism).

C. The Correct Precedent: United Packinghouse Workers of America (UPWA)

Despite not getting a lot of attention at least until 1997 within the genre of work that perhaps can be called collectively "CIO Studies," unionism in meatpacking—in both the Packinghouse Workers Organizing Committee between 1937 and 1943 and, after October 1943, the United Packinghouse Workers of America—developed further than almost any other union within the CIO. The union was by far the best on addressing racial oppression—by 1961, 100 percent of all UPWA collective bargaining agreements banned discrimination based on race, creed and national origin, not only in employment but even in employment applications—and one of the better unions in addressing gender oppression, although their work on gender was not

as strong as on race. It was responsible for considerable economic gains, and definitely improved working conditions. Throughout its entire existence—until it was forced to join the Amalgamated Meat Cutters and Butcher Workmen in 1968 due to industry restructuring (the Amalgamated, in turn, was one of the founding members of the United Food & Commercial Workers' Union in 1979)—the United Packinghouse Workers of America (UPWA) was a democratically-run, rank and file-led, militant union that not only addressed issues in the workplace, but also in the union and the communities in which it was located (see Street, 1993; Halpern, 1997; Horowitz, 1997; Halpern and Horowitz, eds., 1999; and Scipes, 2003).

As suggested in the introduction to this paper, the relatively recent "emergence" of a militant and broad unionism that addresses issues in the workplace, union and community is, in reality, the re-emergence of the form of trade unionism developed by the United Packinghouse Workers of America and a few others—such as the United Electrical Workers (see Filipelli, 1994), the International Longshore and Warehouse Union (see Wellman, 1995), and Local 22 of the Food, Tobacco, Agricultural and Allied Workers (see Korstad, 2003)—in the 1930s and '40s.

Does this conceptualization—social justice unionism—better describe the forms of unionism currently re-emerging in North America than social movement unionism?

D. Discussion: Social Movement Unionism or Social Justice Unionism?

To answer this question, we must turn to the work of Kim Moody, the writer who popularized the term "social movement unionism" in North America, to see if he can provide guidance to resolve this question. Unfortunately, Moody's work does not give us the tools to resolve this issue, nor does the work of others who have built on Moody's conceptualization. His conceptualization of social movement unionism is quite limited, as is Seidman's (1994) on which Moody's is based: neither are theoretically located; they are presented only at an analytical level.

Nonetheless, there is another way to approach this issue. It is argued that using a theoretically-based model offers us a way forward to resolve this issue. The way to resolution is to remember that all unions can be theoretically categorized as one of three types of unions: economic, political, or social movement (Scipes, 1992a, b, 1996, 2001). As indicated above, these North American unions do not fit into either the social movement or political types of trade unionism, but do fit in the economic type.

However, within the economic type of trade unionism, where do they fit? This author has argued that there are two forms or subsets of the economic type of unionism: business and social justice unionism. Based on the analysis above, and learning from the experiences of the United Packinghouse Workers of America, it seems quite clear that they fit in the social justice form of economic trade unionism.

Accordingly, *social justice unionism* is the best term to describe the broad form of economic trade unionism currently developing in North America. Accordingly, it is argued that now and in the foreseeable future, those writing on this "new" unionism in the US and Canada (and Western Europe) should use the term "social justice unionism," replacing the term "social

movement unionism," and that the term "social movement unionism" be reserved for those types of unionism that seek qualitative social, political and/or systemic economic change in their respective social order as well as in the global political-economic-cultural networks.

E. Synopsis

In the second part of this paper, revolving around the term "social justice unionism," we delved into US labor history to seek historical precedents for developments in contemporary North American trade unionism. Utilizing a comparative-historical study of the development of unionism in steel and meatpacking in the Chicagoland area between 1933 and 1955 (Scipes, 2003), we discovered qualitative differences between the two unions in their conceptualization of unionism, in their decision-making processes, and their approaches to racial oppression in the workplace, union and communities. Based on close archival work on the development of both unions, and developing a measurement scale of their practices, we established both the concept of trade union *form* and established that the unionism of these two labor organizations differed qualitatively, enabling us to theoretically establish both *business unionism* and *social justice unionism* as two *forms* of the economic type of trade unionism.

We then argued that the form of trade unionism developed by the United Packinghouse Workers of America, as well as a few others, should serve as the historical predecessor of contemporary progressive unionism in North America.

And finally, we argued that a theory-based approach to trade unionism allowed us to delineate today's progressive unionism as *social justice unionism.*

Conclusion

This paper has argued that as North American labor writers and theorists have tried to develop "new" thinking about trade unionism that has emerged in Canada and the United States over the past two decades, their chosen terminology has conflicted with previously-developed terminology. This has led to the use of the same term to refer to two qualitatively different types of trade unionism, therefore causing considerable theoretical confusion and undermining clear communication by activists and labor scholars globally. This, it has been argued, hinders our understanding of global trade unionism, and it was suggested that it should be reconsidered. At the same time, because "social movement unionism" in North America has not been placed within a global theoretical context, writers have been, in fact, unknowingly overriding a theoretically developed model with one that has not been theoretically developed.

To untangle the problem of terminological confusion and to advance theoretical understanding, this work took four general steps over two parts of this paper. First, emergence of the "social movement unionism" school in North America was discussed (Nissen, 2003), with particular attention being paid to the work of Kim Moody (1997). Much of the work to establish social movement unionism in North America, unfortunately, was conducted without knowledge of the already-existing theoretical work done on social movement unionism, a term used to describe the "new unionism" that developed in three specific labor centers—CUT in Brazil,

KMU in the Philippines, and COSATU in South Africa—in the 1970s and '80s.

In step two, we discussed the origins of the concept of "social movement unionism." Efforts to understand the unionism of these specific labor centers led to an initial theoretical debate that was discussed, as were subsequent efforts to refine the concept of social movement unionism. By examining the development of social movement unionism, we were able to restore the concept to its original purpose, which was to understand the type of unionism developed by three specific labor centers. However, we were able to use this empirical work done on these particular labor centers to further develop global labor theory. Accordingly, in the first part of this paper, this led to a theoretical understanding of global trade unionism, seeing there being three different *types* of trade unionism globally: economic, political and social movement unionism (Scipes, 1992a, b, 1996, 2001).

After theoretically distinguishing between different *types* of trade unionism to help resolve the issue, we asked: could there be qualitative differences within the types of trade unionism identified? The theoretical concept of trade union *form* was advanced, suggesting an affirmative answer to the question, in the second part of this paper. A form was advanced as a subset of a type of trade unionism. To establish this theoretical concept empirically, a comparative-historical study of the development of two CIO unions was briefly considered, identifying two qualitatively different forms of the economic type of trade unionism—business unionism and social justice unionism—and the theoretical concept of trade union form was established (Scipes, 2003).[53]

Fourth and finally, arguing that a theoretical model is the only orientation developed to date that is capable of giving us tools to resolve this issue, it was suggested that this theoretical model proposed herein be adopted to provide resolution on the issue: accordingly, the broad-scope form of trade unionism that is currently developing in North America should now be seen theoretically as a form of economic trade unionism properly titled "social justice unionism."

Thus, this author argues that labor writers and theorists should use the term "social justice unionism" for union activities (where appropriate) in North America as well as in other countries, and no longer use the term "social movement unionism" to describe union activities in North America.[54]

This allows us to recognize the different practices among unions in a number of countries, and to understand theoretically the form of trade unionism currently developing among some unions in North America, while not ignoring or denigrating the accomplishments of workers elsewhere. Once the literature ceases to mis-identify global unionism as identical to that occurring in North America, linguistic precision will enhance the accuracy of these writers discussing global labor issues.

A 20-question scale has been developed by which to measure different forms of [economic] trade unionism. While a study involving more than two unions would need a more elaborate scale devised to help determine relationships among the unions, this is not needed in a qualitative study with only two unions being studied. Nevertheless, there are several issues that need to be specifically considered in any effort to distinguish between business and social justice forms of unionism.

The sets of questions have been divided into two categories—institutional and programmatic concerns—so as to indicate differences between how things are formally organized and how they work in practice. Ideally, a union is formally organized in a way so as to encourage its program, but whether it is remains an empirical question. In any case, it is suggested that actual practice is the more important of the two factors—i.e., any conception of "structural determinism" is rejected—and thus double the weight is accorded to the answers in the "programmatic concerns" section.

In asking the following questions, *business unionism is used as the referent,* so a specific threshold must be reached for a union to qualify as a social justice union: it is assumed that a US-based union is based on business unionism unless it "proves" otherwise. Accordingly, in this measurement scale, one or two points (depending on section) is awarded for attributes associated with social justice unionism. There are 30 possible points than can be accumulated, and *to qualify for classification as a social justice union, a minimum of 20 points (66.7%) must be attained:* this sets the threshold at a high but not impossible level, suggesting that the finding that a union is a social justice union denotes a qualitative difference between that and a business union.

A key feature in any determination is the issue of union democracy (Lipset, Trow and Coleman, 1956/1962). Judith Stepan-Norris and Maurice Zeitlin (1995: 830-836) specifically focus on requirements for union democracy based on the work of Franz Neuman. They argue the standard for union democracy "is the same standard met by any political system qualifying as a democracy." Therefore, union democracy must combine (1) a democratic constitution, with "guarantees of basic civil liberties and political rights"; (2) an institutionalized opposition, which is "the freedom of members to criticize and debate union officials and to organize, oppose, and replace officers through freely contested elections among contending political associations"; and (3) an active membership, which they define as "maximum participation by its members in the actual exercise of power within the union and in making the decisions that affect them" (Stepan-Norris and Zeitlin, 1995: 830). This measurement scale includes these requirements in it, but then goes beyond them as well. While ultimately I believe that all 20 questions relate to the issue of union democracy, I believe that the following relate to the Stepan-Norris/Zeitlin explication: 2, 3, 4, 7, 8, 9, 10, 11, 17, 18 and 19.

However, the question must be asked: is "social justice unionism" simply the same as "union democracy"? No. On my scale, affirmative responses to these items identified immediately above provide 15 of 30 possible points. This, a social justice union conceptualization, by definition (i.e., needing a minimum of 20 points on my scale), requires

more than just affirmative answers to these specific questions; a social justice conceptualization cannot be reached through union democracy alone.

Institutional concerns
1. How was the union founded?
   - 0 points if founded by another union
   - 1 point if the union is the product of rank and file efforts or 1 point if the initial organization bequeathed by the founding union is rejected by the subsequent union
2. Does the Union Constitution ensure freedom of speech and association for members?
   - 0 points if no
   - 1 point if yes
3. Are leaders elected or appointed?
   - 0 point if they are generally appointed
   - 1 point if they are generally elected
4. What is the length of term of office?
   - 0 points if three or more years
   - 1 point if less than three years
5. Do top officers reflect rank and file racial demographics?
   - 0 points if rarely
   - 1 point if generally
6. Do top officers reflect rank and file gender demographics?
   - 0 points if rarely
   - 1 point if generally
7. How often are union conventions held?
   - 0 points if at a three year or longer interval
   - 1 point if more often than three years
8. Are elections for top-level officers publicly held with roll call votes recorded?
   - 0 points if rarely
   - 1 point if usually
9. Must collective bargaining agreements (contracts) be ratified by the general membership covered?
   - 0 points if no
   - 1 point if yes
10. Are members encouraged to participate in union activities?
    - 0 point if generally no
    - 1 point if generally yes

Programmatic concerns:
11. Do union leaders try to ascertain members' concerns and desires?
    - 0 if rarely
    - 2 points if usually
12. Do union concerns extend beyond workplace issues such as wages, working conditions and benefits?
    - 0 points if rarely

- 2 points if usually
13. Does the union actively target continuing discriminations (such as race, gender)?
    - 0 points if rarely
    - 2 points if usually
14. Does the union develop and present on-going education programs?
    - 0 points if rarely
    - 2 points if usually
15. Does the union initiate leadership development programs?
    - 0 points if rarely
    - 2 points if usually
16. Does the union join with grassroots community-based groups to work for social and/or economic justice?
    - 0 points if rarely
    - 2 points if usually
17. Is convention discussion limited to officers' and committees' concerns, or are broad rank and file concerns addressed?
    - 0 points if generally limited
    - 2 points if generally broad
18. Are issues discussed/debated on floor of convention or confined tin committees?
    - 0 points if generally confined to committees
    - 2 points if generally debated on the floor of convention
19. Are bargaining committees limited to full-time staff/officers or broadened to include rank and filers and/or stewards?
    - 0 points if generally limited
    - 2 points if generally broadened
20. When bargaining committees are broad, are members active participants or for "decoration" (i.e., mainly observers)?
    - 0 points if generally for decoration
    - 2 points if generally active

From answers to the above questions, a union can be categorized as either a business or social justice union: if a union is awarded 19 or fewer points, it is classified as a business union; 20 or more points gets it classified as a social justice union.

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1   For a set of articles by an American labor activist that covers many of the struggles and much of the writings on
    US labor over the past 30 years—particularly by activists, but also some academic studies—and which
    particularly focuses on issues related to revitalization, see Early, 2009. See also his more recent collection:
    Early, 2013.
          The broadest compilation of writings on the contemporary US labor movement (along with a fair collection
    on selected labor movements around the world) that this author is aware of, including books and articles, is the
    on-line "Contemporary Labor Issues Bibliography" at http://faculty.pnc.edu/kscipes/LaborBib.htm (accessed
    November 28, 2014). While this does not claim to be complete, the listings cover a wide range of particular
    subject areas, are updated fairly regularly, and include writings by academics as well as labor activists. These
    references are also linked to Internet sources whenever possible.
          It should be noted that, the Canadian labor movement has been facing many of the problems faced by that
    in the US, although they are not in quite as bad of shape (see Gindin, 1995). Nonetheless, other Canadian
    scholars—see, for example, Fairbrother and Yates, eds. (2003), Kumar and Murray (2006), Kumar and Schenk,
    eds. (2006), and Ross (2008)—have joined the discussion about labor movement revitalization, focusing
    primarily on the Canadian labor movement. As Ross' bibliography (2008: 153-157) indicates, this is in
    interaction with the relevant American literature as well as their own.

2   There is growing interest in "social movement unionism" (SMU) in developed countries outside of North
    America—see in particular Vandenberg (2006) for Sweden; and Dunn, 2007; Mathers, 2007; Upchurch, Taylor
    and Mathers, 2009; and Upchurch and Mathers, 2012 for Western Europe in general—but Ince (2007) says it is
    mostly confined to the "Anglophone world." An important part of this is due to the popularization and
    dissemination of the concept by Kim Moody (1997), and the North American network in and around the
    English-language labor activist journal, *Labor Notes.* Contemporary discussions of social movement unionism
    herein, unless specifically identified otherwise, are confined to North America, but it is important to recognize
    that discussions on SMU in the developed countries are not just confined to Canada and the United States.

3   This author served as an elected board member of RC 44 from 2006-2010, being elected at the International
    Sociological Association's World Congress of Sociology in Durban, South Africa in 2006.

4   Although the South Korean labor movement was included in my earliest writings on social movement
    unionism (see Scipes, 1992a, b)—based largely on early reports of the 1987 "Great Worker Struggle"—and
    Siedman (1994: 264-272) suggested that social movement unionism would emerge in that country, this author
    has been convinced by Hagen Koo (2001), author of a wonderful study of the Korean labor movement, that the
    South Korean unions and labor centers should not be classified as exemplars of social movement unionism:
    "the South Korean labor movement did not develop … what Seidman (1994) calls 'social movement
    unionism'" (Koo, 2001: 203).
          Nonetheless, Korean workers have engaged in heroic struggles to build independent, worker-controlled
    unions, and while they do not meet the requirements of social movement unionism, their struggles still must be
    respected. For writings on these struggles and how Korean workers developed class consciousness, see Koo
    (2001); for an excellent account of the emergence and development of the garment and textile workers' union in
    South Korea, mostly populated by young women and which played a central role in the emergence of popular,
    democratic and independent (from the state) trade unionism, see Chun (2003). Although written from a more
    traditional industrial relations approach, see Song (2002) for an overview of developments in Korean unions.
    Park (2007), on the other hand, examines the KCTU (Korean Confederation of Trade Unions) experience, and
    argues that the KCTU experience invalidates the concept of social movement unionism. For an examination of
    the Korean workers and the affects of neoliberal globalization, see Gray (2008).
          For discussion of other possibilities of SMU, see Scipes, 1992a: 123, footnote #6. For a recent and
    excellent discussion of *Solidarnosc,* the radical labor center of Poland, see Bloom, 2014.

5   Note that it is the trade union *organization* that is the independent variable, not the country—any country could
    have two or three different types of trade unionism. Again, specifically, this is not a "third worldist" type of
    trade unionism.

6 Thus, this paper addresses the problem of applying the same term to qualitatively different social phenomena, and is not merely a focus on terminology, as one previous reviewer initially claimed.

7 Stephanie Ross discusses "social unionism" in Canada. In it, she notes, "There is a great deal of confusion about the definition of social unionism, and a wide variety of terms and practices are associated with it in both labor movement documents and academic literature. In particular, 'social unionism', 'social movement unionism', 'community unionism', and the 'organizing model' are used interchangeably to refer to a common set of North American union orientations and revitalization strategies" (Ross, 2008: 131).

8 Gay Seidman (2011) discusses some of the confusion around this term as well, although I don't think her analysis is as clear as is needed.

9 While Mexico is geographically located in North America, it is not included in this discussion because of a number of distinct factors—including colonial history, social structure, political system, culture, dominant language, level of economic development, form of trade unionism, etc.—that qualitatively differ from the US and Canada, which are much more similar among themselves. This is not to imply that the social situations in the US and Canada are superior vis-à-vis Mexico—they are in some ways, but not in others—but for this discussion, Mexico is not included.

10 This is not to suggest that, in the future, additional types and/or forms could not be added to this theoretical approach. However, these would be limited to being based on identified sets of practices. The normative prescriptions suggested by Waterman (1993, 1999, 2004, 2008), ostensibly part of this discussion, might guide future trade union development, but until sets of practices of how this works in practical terms are identified, it is argued that these should not be included in this theoretical model.

11 After accepting the three types of trade unionism—economic, political and social movement types—and in parallel with this argument, Pillay (2013) argues that there are three "sub-types" of the political type of unionism: Marxist-Leninist, Nationalist and Social Democratic. I replace the term "sub-type" with "form." However, while there are some specific differences, we are generally in accord with our approaches, and our work is compatible, albeit needing some continued refinements. Nonetheless, we now have two scholars who have developed basically the same theoretical understandings.
    In his references to the article (Pilay, 2013), there is one listing as "Anonymous, 2010." Unknown to Pillay—it appears he was reviewing this paper in a "double-blind" process, and he didn't know who the author was of the piece—that was an earlier version of this paper, a version that was not published.

12 Again, there is no theoretical reason that social movement unionism could not appear in the Global North; however, to date, it has not.

13 Paul Johnston (1994), in an excellent study that has not received the attention it deserves, was the first to use this term regarding unionism in North America as far as I can ascertain. Nonetheless, almost all references to this subject refer to Moody, 1997.

14 Schiavone (2007: 281), who is the first to analyze Moody's conceptualization of SMU in regard to actual trade union practices, uses the exact same quote from Moody to define Moody's conceptualization. Waterman (2004: 217-218), discussing Moody's concept theoretically, uses another quote from p. 276 of the same book (Moody, 1997), as does Fairbrother (2008: 214-215). Neither quotation, in this author's opinion, is a theoretical explanation of social movement unionism, despite suggestions otherwise.

15 For some unknown reason that he has apparently never publicly explained, Moody totally ignores the KMU *(Kilusang Mayo Uno* or May First Movement) Labor Center of the Philippines in his book on "Unions in the International Economy" (Moody, 1997). This is surprising in light of the considerable amount of published material available on the KMU before 1997, including a number of articles in *Labor Notes,* of which he was a founder and long-time staffer. *Labor Notes* also had Leto Villar, KMU National Vice Chairman, speak at their November 1986 conference—this author stood next to Villar while at the conference as he made a call to the Philippines during which he learned about the assassination of KMU Chairman Rolando Olalia. See Labor

Notes, 1986a, b. Even if the KMU did not fit his understanding, I argue that Moody should have recognized its existence (see Lambert, 1990; Eckstein, 1986; Eisenhower, 1991; Scipes, 1986a, 1989, 1996; also West, 1991, 1997).

16 In one of a number of conversations during 1993-94, when I was studying with her at the University of Wisconsin-Madison, Seidman told me—although I cannot date the conversation—that her use of SMU was stimulated by Eddie Webster at the University of the Witwatersrand in Johannesburg in the mid-1980s. Webster, as will be discussed below, later engaged in an international debate on different types of trade unionism, and especially on the new unions of the Global South. Seidman, although using Webster's terminology, was apparently unaware of this international debate, for she did not participate in it.

17 Writers who have used the concept of SMU in discussing labor organizations in the Global South, subsequent to the initial debate, have also focused recognized challenges to the state as being a key aspect of SMU. Philip Hirschsohn (1998: 634) specifically focuses on challenges to the state as part of his understanding of social movement unionism. Jeffrey Sluyter-Beltrão, in his study of the CUT, builds off of Scipes, 1992b, and defines SMU as having three "core commitments": participatory democracy, political autonomy, and societal transformation. He further amplifies: "Although western labor observers and organizers have often neglected SMU's commitments to societal transformation, that third basic dimension is *an equally essential characteristic"* (emphasis added) (Sluyter-Beltrão, 2010: 6-7.)

     In a later piece, Gay Seidman (2011: 96) supports this broader understanding: "… industrial workers discovered they could use factory-based unions as a vehicle for political demands, their movements often became central to broad challenges to what Brazilian unionists often called the 'savage capitalism' of elitist, inegalitarian growth."

18 Although it had been previously suggested that this author was, in fact, referring to capitalism here, I disagree: while the economic base of these respective social orders was and is capitalist, it is incorrect to conflate the social order with capitalism. By larger social order, I mean the entire range of social relations within a stratified social order, and while including the economic system, this definitely goes beyond it. However, there is a range of positions within these labor centers as to whether capitalism must be replaced or not. Further discussion is beyond the scope of this argument.

19 Writers who have been influenced by the work of Immanuel Wallerstein would refer to these global political-economic-cultural networks as the "world system" (Wallerstein, 1974). This conceptualization is rejected—I do not accept that there is a world "system"—hence, this particular terminology. For the best theoretical critique of Wallerstein's work, see Nederveen Pieterse, 1989, especially Chapter 2.

20 Voss and Sherman (2000), while not adopting this terminology specifically in this article are aware of it, refer a number of times to social movements, and this author thinks it would be fair to place them within this "school" of studies.

21 Beginning in 2008, SEIU (Service Employees International Union)—which has served for many writers as the epitome of North American "social movement unionism"—became involved in several conflicts, both internally and with other unions in the US and Puerto Rico, especially raising issues of union democracy and member control over their organization. There are several articles regarding this listed on Scipes' "Contemporary Labor Issues" Bibliography, and see in particular Early, 2011. Despite knowing of some of these developments, I chose not to address them herein, as they are not relevant to this specific argument.

22   Gay Seidman discusses how this has differed from the earlier industrialization experiences:

      Despite some similarities, industrialization in what are sometimes called 'semi-peripheral' areas may not mirror the European and North American experiences.... ... patterns of industrialization in the late twentieth century have often involved reliance on imported technologies developed in core industrialized areas, as well as on infusions of foreign capital, and have depended on links to international markets. While de-skilling of artisans has occurred from place to place, the new technologies have frequently been put in place without many of the labor

process conflicts that apparently marked earlier industrialization. Mass production processes using semi-skilled workers have been in place from the start of industrial growth... (Seidman, 1994: 6).

23 All of that being said, I think their work *is* important. This will make more sense after reading this entire article, but I would place what they have found as social justice unionism (SJU), a subset of the economic type of trade unionism. However, their findings suggest a need to differentiate between institutionalized SJU and non-institutionalized SJU, which would broaden and perhaps deepen our understanding of SJU, in itself, thereby making an important contribution to our collective theoretical project.

24 Again, it is the trade union *organization* that is the independent variable, not the country.

25 There are considerable writings on these new labor organizations. For some of the best books on development of the new unions in South Africa, see Baskin (1991), Buhlungu, ed. (2006), Friedman (1987), Kraak (1993), MacShane, Plaut and Ward (1984), and Von Holdt (2003), and and for additional references, see Barchiesi (2007), Bezuidenhout (2002), Bramble (2003), Hirschsohn (1998, 2007), Pilay (2008, 2013), Scipes (2001), Von Holdt (2002), and Wood (2003). For books on the development of the new unions in the Philippines, see Scipes (1996) and West (1997); for a strong article on the development of the KMU between 1980-86, see Lambert (1990); for an in-depth look at the social context in which the KMU operates, which has been subject to—at that time—37 years of neoliberal economic policies, see Scipes (1999); for an in-depth look at how the KMU builds international labor solidarity, see Scipes (2000); and to see what this author thinks can be learned from the KMU to help us build global labor solidarity, see Scipes (2014b). Jeffrey Sluyter-Beltrão (2010) published a book in English on the "new" unions in Brazil, fulfilling a massive hole in the literature, although two excellent articles that focus on the new unions in Brazil, at least in part, had been published before his monograph—see Beynon and Ramalho (2000), and Guidry (2003). Also, Thomas Collombat's (2011) innovative yet unpublished Ph.D. dissertation, compares Brazilian and Mexican unions, and their efforts to build international labor solidarity throughout the Americas, providing another perspective on Brazilian Labor.

26 While this early debate began with a consideration of "labor movements," it was quickly seen that there were competing "labor movements" within each of these countries, and thus the debate shifted to considering "labor centers." In international labor terminology, the AFL-CIO, for example, is a labor center. Scipes (2001:4) specifically discusses the relationship between labor movements and labor centers.
    The larger point here is that the initial debate was around how do we understand these newly emerging types of trade unionism at the labor center level. Subsequent theoretical development, as shown below, has been to try to discuss the emergence of this type of trade unionism at more specific (and "lower") levels, such as at the industry-wide level (see Hirschsohn, 2007) and at the individual firm level (Von Holdt, 2003); see also Barchiesi (2007) for a discussion of municipal-based unions. Developments at these levels have subsequently been used to try to reflect upon, if not refine, the type of unionism exemplified at the labor center level.

27 These were based on "workerist," "populist," and "popular-democratic" visions of trade unionism that had developed in South Africa. For a recent discussion of this, see Pillay, 2008: 282-284.

28 Waterman's and Lambert/Webster's conceptualizations are described and critiqued in Scipes (1992a: 124-134).

29 By "national socio-political-economic situation," this author was not only referring to the national situation within the country, but to each country's specific position within global political-economic-military-cultural networks; i.e., this was being placed within the global context.
    Incidentally, disagreement arises with Gay Seidman, who states, "But the concept [of social movement unionism] was not ever clearly defined; even those of us who used it freely weren't entirely sure of its meaning" (Seidman, 2011: 98). However, as far as I can determine, Seidman has never engaged with my work on this subject, and I would argue that I have been quite clear on his conceptualization since putting forth this specific conceptualization.

30 This appears to be an effort to discredit my position (as well as that of Rob Lambert) regarding this issue, instead of seriously addressing my arguments, which Waterman has never done, here or anywhere else. And

interestingly, especially in light of Waterman's emphasis on "internationalism," Waterman does not include an article that specifically discusses the very innovative international program of the KMU, which Waterman placed on his very own "Global Solidarity Dialogue" web site (Scipes, 2000a).

31 This author has developed a new theoretical understanding for macrosociology that he calls "Polyconflictualism." See Scipes, 2010a: 130-150, where this approach is explicated.

32 This claim that Waterman's prescriptions are normative has also been made by Von Holdt, 2002: 285. Fairbrother and Webster (2008: 310) specifically point out that Waterman's 2008 contribution "is normative." Devan Pillay (2013: 13) also describes Waterman's work at "normative."
      Although I have problems with Dunn's (2007) larger argument, he also challenges the theoretical basis of Waterman's positions.

33 For a much more recent article about SIGTUR, see Dobrusin (2014).

34 The latest set of articles published on SMU (Fairbrother, 2008; Fairbrother and Webster, 2008; Waterman, 2008) does not really fit into this specific discussion on SMU; the first two articles generalize a global perspective, unifying the concept across both the North and South instead of discussing the actions within certain labor centers, while Waterman continues his foray into his prescriptive normativism, arguing how unions should develop around the globe.

35 Hirschsohn (1998: 635) also limits his consideration of COSATU, stopping at 1990. It may be possible to decide whether Hirschsohn or Scipes were more accurate or not on this point, but it is basically irrelevant for this paper: the point is that both recognize that COSATU fit their respective conceptualization up to a certain point in time, and then things became unclear. Pillay (2013: 17) subsequently clarified this, arguing that "COSATU proceeded to play the leading role in the anti-apartheid struggle inside the country in the late 1980s, and inspired labour scholars and activists throughout the world as a model of social movement unionism." He continues, "However, since 1990, when the ANC [African National Congress] and SACP [South African Communist Party] were unbanned and took over the leadership of the Alliance [of which COSATU was also a member-KS], there was a gradual narrowing of focus for COSATU."
      This raises an important point: one never achieves "social movement unionism-ness"; it is a process of construction that continues over time. Accordingly, even labor centers seen to be social movement union-type centers can revert back to economic or political types of unionism. Pillay (2013) specifically argues that post-1990, COSATU reverted back to a political type of unionism.
      In fact, Sluyter-Beltrão's (2010) project is to try to understand what happened with the CUT in Brazil (which he argues no longer is a social movement-type center), so that people can try to prevent this "reversion" in the future.

36 Von Holdt (2002, 2003) has provided us with a truly excellent case study of the development and disintegration of social movement unionism within a single industrial organization. Key to his study is the *internal contestation* (i.e., within the union) over the understanding, meaning and activities of SMU within one organization. There is a tremendous amount to be learned by his carefully done study. However, while agreeing with him that "national reality counts" (Von Holdt, 2002: 299)—arguing against general prescriptions such as put forth previously by Moody (1997) and Waterman (1993)—this author argues that Von Holdt overgeneralizes the results from his study: he assumes that things he found in the specific case of Highveld Steel (specifically intra-union violence) to be representative of social movement unionism overall, for which he provides little evidence to support, but which is contradicted by research findings from the Philippines (see Lambert, 1990; Scipes, 1996; West, 1997), where this was not found.

37 Von Holdt (2003) specifically includes the Philippines, along with Brazil and South Africa in his understanding of social movement unionism. However, although he knows of Lambert's 1990 study and Scipes' (1992a), he does not really make use of either in his conceptualization: he refers to Munck (1988), Waterman (1993—after Waterman took his more normative approach), Seidman (1994) and—most surprisingly—Moody (1997) (Von Holdt, 2003: 24-25, FN #4).

Had Von Holdt been aware of this author's monograph (Scipes, 1996), he would have seen that at least in the Philippines, SMU emerged in sugar plantations, capitalist agriculture, and extractive mining in addition to semi-skilled manufacturing, therefore emerging in both colonial and post-colonial production systems. Accordingly, Von Holdt (hopefully) would not have confined his definition to "semi-unskilled manufacturing work."

38 Development of SMU has not been linear, nor continuous; in fact, it seems likely that the transition to democracy and some sort of accommodation between the labor-supported political parties that took political office and the respective labor center in Brazil and South Africa directly affected social movement unionism, "diluting" it and perhaps leading back to some form of economic or politial unionism. Bramble (2003) and Barchiesi (2007) raise similar questions about COSATU, while Pillay (2013) specifically claims that COSATU has reverted back to political unionism; Sluyter-Beltrão (2010) makes a similar claim for CUT. [Upchurch and Mather (2012: 11) argue that SMU theorists have not considered sufficiently the role of the state, and argue that the changing institutional context could have an important impact on subsequent development.]

   The transition from the dictatorship of Ferdinand Marcos to the "democracy" led by Corazon Aquino in the Philippines really was only a resumption of "traditional elite democracy" (see Kerkvliet and Mojares, eds., 1991; McCoy, 2009: 433-451), which did not lead to substantial change and, in fact, led to continued—and, in fact, worsened—repression against the KMU (Scipes, 1996), precluding any political accommodation.

   Theoretically, this suggests that social movement unionism can arise during periods of authoritarianism—it does not have to—but that does not guarantee that unions who adopt social movement unionism as their type of trade unionism will always keep it; it seems clear that they can change—for better of worse—when they see their particular situation requiring it (such as the imposition of popular democracy—see W.I. Robinson, 1996). However, any change of regime to popular democracy must be "in fact," not just a "name change," as the experiences of the Philippines warns.

39 Devinatz (2008) provides an overview of how "social movement unionism" (based on Moody's conceptualization) has been used by unions and community organizations in the United States.

40 Historical examples are used to illustrate his three types of trade unionism. From Selig Perlman's (1968/1928) comparative study of labor movements in Germany, Britain, the US and Russia in the nineteenth and early twentieth centuries, this author uses Perlman's work on trade unionism in the US—which was described as "an economic institution," based on "job consciousness" that limits itself to "wage and job control" (Perlman, 1969/1928: 169)—to illustrate what is called "economic unionism." Victoria Bonnell's (1983) study of workers in St. Petersburg and Moscow between 1900-1914, whereby workers ultimately decided to subordinate themselves and their unions to a group of intellectuals' organization (Bolshevik Party) (Bonnell, 1983: 7-8), is used to illuminate what is called "political unionism." This author's study of the KMU over the years 1980-1994 (Scipes, 1996) is used to explicate what is advanced as "social movement unionism."

41 Pillay (2013: 14) agrees, specifically discussing three different "sub-types" of political unionism: Marxist-Leninist, Nationalist and Social Democratic.

42 The study herein is limited to examining qualitative differences among economic types of trade unionism, and does not examine differences among political or social movement types of trade unionism.

43 Meaning that once production started, then the iron or animals had to be processed to at least the "semi-finished" stage before stopping, otherwise the steel or the meat would be ruined.

44 This analysis was based on extensive archival research at the Chicago History Museum, particularly of the steelworkers' efforts in the Chicagoland area. There has been little published on steel in this area—most importantly has been Needleman (2003), but see Dennis' (2010) study of the 1937 Memorial Day Massacre, as well as his subsequent 2014 study. Also, there is an excellent, unpublished Ph.D. dissertation by James Kollros (1998). There have been two important monographs published on meatpacking—Halpern (1997) and Horowitz (1997), and they have published together an oral history of their efforts (Halpern and Horowitz, eds., 1999). There is also an excellent, unpublished Ph.D. dissertation by Paul Street (1993). This was also accompanied by

extensive archival research at the Wisconsin Historical Society, where the papers of the United Packinghouse Workers of America are located.

45 As far as I can tell, the term "social justice unionism" (SJU) was first developed in my study (Scipes, 2003), although Tait (2005) and Fletcher and Gapasin (2008) have subsequently adopted the term, each independently from me. I wanted a term that both differentiated a form of economic trade unionism distinct from business unionism, and one that specifically referred to struggles for social justice, as that is how the packinghouse workers saw their efforts (see especially Halpern and Horowitz, eds., 1999).

    What I am now calling "social justice unionism" has long been known within North American labor studies as "social" unionism (see Horowitz, 1997; and see Ross, 2008). This, however, was generally superseded by Moody's (1997) version of SMU. And now, this author is suggesting that SMU in North America be replaced with SJU, which I suggest is a much more accurate term for this type of unionism than either social or social movement unionism, and differentiates progressive trade unionism in North America from the type of unionism practiced, at least initially, by CUT, KMU, and COSATU.

46 For an initial effort to theorize these different approaches, see Scipes, 2010a: 130-152.

47 Melucci (1989) developed his work on the "new social movements" such as feminism, the counter cultures, etc., of the 1970s and '80s, particularly in, but not limited to, Italy. He went to considerable lengths to differentiate them from the "old" social movements of "labor" and "nationalism."

    However, Carol Mueller challenges this limited view: "Although Melucci argues that the process of constructing collective identities is a unique characteristic of highly complex societies, *he may also underestimate how universal the process of cultural transformation has been as a prelude to previous periods of mass mobilization.* The development of a collective identity centered on class consciousness among the working class in England (1780-1830), France (1830-1833), and Russia (1900-1914) point to a similar combination of social analysis contained within a new collectivite identity and institution building…" (emphasis added) (Mueller, 1994: 238).

    Mueller's analysis is convincing, and allows Melucci's approach to be extended to labor movements.

48 Ross (2008) argues that not all social unions are democratically run and criticizes this; as shown, I antipated her understanding into my conceptualization of both forms of economic trade unionism.

    My conceptualization recognizes that not all social justice unions are democratically run—for example, I would place the UAW (United Auto Workers) and the SEIU (Service Employees International Union) in this category, as well as, following Ross (2008: 134), the Canadian District of the United Steelworkers of America. However, I would place social justice unions as a whole not in a dichotomy between democratic/not democratic unionism, but on a continuum, with the UAW and SEIU toward the "not democratic" end, with CUPE (Canadian Union of Public Employees), CUPW (Canadian Union of Postal Workers), the UE (United Electrical Workers), the ILWU (International Longshore and Warehouse Union) and the late UPWA (United Packinghouse Workers of America) toward the more democratic end.

    Similar processes hold across business unionism as a whole.

49 In other words, this provides a more sophisticated and robust explainor than does the long-established tradition of examining interactions only between members and leaders within unions.

50 At the same time, the steel workers' union was controlled exclusively by a small group of formal leaders at the top of the union, while the packinghouse workers' union was controlled inclusively by rank and file members through constitutionally-established popular democratic procedures.

51 The Appendix herein provides an explanation of the conceptualization of the measurement scale, and lists the questions used to differntiate between the two forms of economic trade unionism.

52 I commented specifically on this point. "I had initially given the union a score of 28/30. However, on January 27, 2001, in an interview with Les Orear—who had gone into the stockyards as a labor organizer in 1933, was one of the founding members of Local 347 in Armour, one of the founders of the UPWA [United Packinghouse Workers of America-KS], and who after 1947 served on the international staff of the UPWA and later, after the

merger, the Amalgamated Meat Cutters and Butcher Workmen of North America until he retired in 1977—I asked him to evaluate the [Packinghouse Workers Organizing Committee]/UPWA on the basis of my measurement scale. It turns out, in Orear's opinion, that I had been too conservative: he said the union should have gotten 29/30, not just 28. (I had not been sure that elections for top-level officers were recorded by roll call vote, which he assured me they had.) Accordingly, I changed my rating based on Orear's account. (The one place that the union failed was that the top officers did not reflect rank and file gender demographics.)" Scipes, 2003: 63, Note #46.

53 This work has been supported subsequently by the work of Devan Pillay (2013) of South Africa, who has established the existance of different sub-types—what this author is calling "forms"—within the political type of unionism, supporting my argument.

54 Accordingly, after recognizing the qualitative differences between SMU and SJU, it will be necessary to review the (now) SJU literature (from Moody onward) after "removing" the attributes included from the specific "southern" unions, and theoretically solidify the concept.
    Likewise, the "cleansed" SMU literature needs to be clarified and theoretically solidified, based on sets of practices.

55 This appendix is taken from the author's Ph.D. dissertation (Scipes, 2003: 412-415).