

## SCHOLARSHIP ON SOCIAL MOVEMENT ORGANIZATIONS: CLASSIC VIEWS AND EMERGING TRENDS\*

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*This essay examines research on social movement organizations (SMOs) within each of the three major schools of social movement theory: resource mobilization, political process, and cultural-cognitive approaches. We map the general terrain of these perspectives and demonstrate how they have established enduring and emerging trends in SMO scholarship. By briefly revisiting some of the central findings and theoretical arguments of SMO research, we provide a background for future research in social movement organizational processes and a foundation for the articles contained in this special issue.*

Almost forty years have passed since Zald and Ash (1966) noted that social movement organizations (SMOs) were unique entities and deserved special consideration. In the decades that have ensued, social movement theorists have acknowledged that organizations provide an important, if not critical, basis for mobilization. Despite their significance, however, scholarship and theory on SMOs have been eclipsed by research on movements in the aggregate. Because the emphasis has been on movement-level issues, many studies of SMOs have proceeded without the clear guidance of systematic theorizing and a cogent set of theoretical questions. As a result, there are gaps in what we know about SMO characteristics and their contributions to social movements. In recent years, the proliferation of local, national, and transnational SMOs signals the importance of maintaining our studies of how organizations contribute to social movement formation, mobilization, maintenance, and outcomes. Their growing import also has led to calls to study SMOs “in their own right” (Clemens and Minkoff 2004) and, as a means for achieving this goal, to bridge social movement and organization theories (Davis, McAdam, Scott, and Zald 2005; Lounsbury and Ventresca 2002; Minkoff and McCarthy, this issue).

This special issue of *Mobilization* was motivated by a desire to reinvigorate studies of SMOs. By taking them as the subject of analysis, we seek to extend our knowledge of SMO structures and practices as well as the organization dynamics associated with social movement processes. To this end, we present a collection of articles that highlight empirical contributions that have helped define SMO scholarship over the years and that illustrate as well as identify emerging theoretical approaches and empirical questions that can guide research into

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the future. As discussed by Edwards and Andrews (2004), there are diverse views regarding the types of organizations that should be classified as SMOs and how they differ from interest groups and nonprofit organizations. In particular, some scholars maintain that SMOs are those organizations that rely on contentious action (e.g., Jenkins 1987; Lofland 1996). Others suggest that tactics are less important than the types of claims being made or the ideological basis of the organization (Lofland 1996; Walker 1991; Zald 2000). All of the authors who contributed to this special issue adopt an inclusive view of SMOs, regarding them as any civil-society organization that aligns its “goals with the preferences of a social movement or countermovement and attempts to implement those goals” (McCarthy and Zald 1977: 1218). This introduction develops a foundation for the articles contained in this issue by examining key contributions to our understanding of SMOs that have emerged from studies conducted within the resource mobilization, political process, and cognitive-cultural traditions. There are many overlaps between these perspectives. However, looking at each separately provides a means for mapping the general terrain of SMO scholarship and for identifying classic views and emerging trends.

### **RESOURCE MOBILIZATION THEORY AND SMOS**

Early views of social movements suggested that protest and other types of disruptive action were irrational or used only by marginalized members of society (e.g., Gurr 1970; Kornhauser 1959). The emergence of resource mobilization offered an alternative perspective by arguing that collective action is a rational response that only can occur when adequate resources are available (McCarthy and Zald 1977). A critical contribution provided by this perspective was that social movements rely upon and are composed of formal organizations. In the civil rights movement, for example, churches provided important forums for organizing (McAdam 1982; Morris 1984) while in the women’s movement, the networks that were formed among participants in the New Left (Evans 1980) and the civil rights movement (McAdam 1988) served as a basis for mobilization. Though many movements take root within existing organizations, it also is common for new organizations that are dedicated to movement goals to be formed (Friedman and McAdam 1992; Tarrow 1998). Not only do these SMOs serve as anchors for social movements, they also help to maintain movements when resources are constrained or when the political or social climate is unfavorable (Staggenborg 1988).

Resource mobilization theory reoriented thinking about the structure of social movements by promoting awareness that organizations provide a basis for mobilization. It also expanded awareness of the types of organizations that contribute to and address movement related issues. Prior to this point, the prevailing assumption was that social movements were rooted in voluntary associations and ad hoc groups with memberships that were composed of the direct beneficiaries of movement activity. It was also generally assumed that these were informal groups that relied on contentious action. In contrast, the resource mobilization perspective maintained that professionalized organizations that had full time, paid leadership and a nonexistent or paper membership base were central to movement mobilization, stability, and maturation (McCarthy and Zald 1977).

Recognition that diverse types of organizations are associated with movement activities initiated a body of research examining SMO characteristics, particularly variations in formalization and professionalization. Similar to patterns seen in profit-seeking organizations, a relatively consistent finding is that the more formalized an SMO, the more likely it is to have routinized tasks, a clear division of labor, hierarchical decision-making processes, and codified membership criteria (Staggenborg 1988). In contrast, movement organizations that are less formalized, often are managed by volunteers, have few procedures or policies, do not have routinized decision structures, adapt to meet demands, are influenced by individual leaders, and tend to have autonomous chapters (Staggenborg 1988).

A recurring consideration in SMO scholarship is the way that these organizations develop over time. Reflecting Weber's classic view of organizations, Michels' ([1915] 1962) "iron law of oligarchy" suggests that the goal-directed efforts of organizations will be displaced over time by activities that are dedicated to survival. In keeping with this assertion, SMO research has investigated whether SMOs shift from being relatively informal and goal-oriented to increasingly formal and bureaucratic, with power becoming highly centralized. While several classic studies supported this thesis (e.g., Messinger 1955; Sills 1957), challenges to the inevitabilities of goal displacement and bureaucratization have consistently been raised (e.g., Gerlach and Hine 1970; Jenkins 1977; Rucht 1999; Voss and Sherman 2000; Zald and Denton 1963). As a result of observed variations in trajectories, it appears that oligarchy is one of many potential outcomes rather than the destiny of all SMOs that endure (Kriesi 1996; Tarrow 1998; Zald and Ash 1966).

SMOs may develop in many different ways and have varying degrees of formalization and professionalization. The degree of formality that is adopted, however, can facilitate as well as impede goal attainment, resource acquisition, legitimacy, and mobilization capacity (Zald and Ash 1966). Bureaucratic organizations often are more successful at gaining access to established political channels (Ferree and Hess 1985), being recognized as legitimate movement representatives (Gamson 1975), and at sustaining ongoing interactions with diverse constituencies including "allies, authorities, and supporters" (Tarrow 1998: 137). Unlike their more formalized counterparts, it appears that informal SMOs are often able to mobilize quickly and adapt to emerging situations (Gerlach and Hine 1970; Piven and Cloward 1977). They also appear to have fewer barriers preventing them from engaging in disruptive action (Tarrow 1998). At the same time, centralized decision making and a clear hierarchy can facilitate rapid mobilization since they reduce conflict and ambiguity (Gamson 1975; McCarthy and Zald 1973, 1977). While research shows advantages and disadvantages related to various forms, often the internal challenge for an SMO is finding the proper balance between the extremes of formal organization and autonomy (Tarrow 1998).

Classic studies conducted in the resource mobilization tradition have established a legacy of SMO research while contributing to emerging trends in three critical areas. The first is a stream of research examining the organizational basis of mobilization. Studies in this area consider the ways that SMOs coordinate mobilization and the contributions that they make to movement stability (e.g., Morris 1984; Staggenborg 1989; Taylor 1989; Whittier 1995). The second body of research examines how resources are related to SMO strategy (e.g., Edwards and McCarthy 2004a; Ganz 2000) and how they can facilitate as well as impede organizational mobilization (e.g., Cress and Snow 1996; Edwards and McCarthy, 2004b; Jenkins and Eckert 1986; Jenkins and Perrow 1977; McCarthy and Wolfson 1996; Staggenborg 1989). Third, there is a body of research that continues to examine SMO structure, although the emphasis is no longer typically on degrees of professionalization or whether organizations are developing along a particular trajectory. These studies explore a broad spectrum of issues ranging from descriptions of populations of SMOs (Edwards and Foley 2003) to the persistence of particular organizational forms (e.g., McCarthy 2005) to the relationship between structure and internal SMO dynamics (e.g., Balser 1997; Useem and Zald 1987). As these patterns suggest, not only does SMO scholarship associated with resource mobilization seek to understand how organizations contribute to movement coordination and stability, but there is a growing body of research investigating SMO structures, practices, and processes.

### **POLITICAL PROCESS THEORY AND SMOS**

The political process approach to social movement analysis focuses on explanations of movement success and failure rather than SMO structures and processes. The emphasis tends

to be on longer cycles of mobilization and decline and on factors external to movements that can constrain and shape movement outcomes. Given the relatively long-term and macrolevel perspectives of political process theory, the concept of political opportunity structure has been elaborated to subsume many of the specific elements shaping movement development. This concept suggests that cycles of mobilization are influenced by the opening and closing of challenging groups' access to the political process (Tarrow 1998). Although the relevant factors may vary depending on the level of analysis, several are commonly accepted as basic and widely generalizable: (1) institutional provisions for participation, (2) stability of political alignments, (3) elite access and alliances, (4) elite conflict, and (5) level of repression (Tarrow 1998; McAdam 1998, 1982). Though initially associated with political institutions and conditions, later political process scholars did not limit their attention to these factors alone, but extended this view to include cultural and social contexts as factors that attenuate movement dynamics (e.g., Gamson and Meyer 1996; Rucht 1996).

Like resource mobilization scholars, political process theorists view SMOs as important resources for social movements. Both recognize that these organizations contribute to movement architecture by serving as springboards for mobilization, incubators of talent, and collectors and disseminators of critical information. However, political process scholarship is differentiated from resource mobilization by its sensitivity to sociopolitical contexts and by the way it views the relationship between SMOs and their institutional environments. Further, since political process theorists focus on organizations as building blocks for movements, they generally do not investigate individual SMO features such as size or structure. Instead, studies that take SMOs as their point of departure often use them to examine how cycles of organizational protest reflect responsiveness to external conditions (Meyer 1993a, 1993b).

The emphasis on aggregation leads many political process theorists to take organizational fields and networks as their units of analysis. With respect to the former, once again, the dominant perspective is that conditions in the external environment largely explain the configuration of SMO fields. This viewpoint is illustrated by comparative studies that associate features like the number of SMOs and the size of their membership base—whether over time (Minkoff 1995) or at a given point in time (Kriesi 1996; Rucht 1996)—to variation in the political opportunity structure. With respect to networks, they forge links between individuals and between organizations and, in the process, promote coordination and can facilitate protest (Bennett 2004, 2005; Kriesi 1996; McCarthy 1996; Rucht 1996). Networks also establish a means by which information and ideas are communicated. Agreement with a cause is an essential criterion for participation. However, participation requires that beliefs, concerns, and predispositions be reinforced with some method of affiliation. As a result, associations and interpersonal ties not only provide a means for organizing action, but serve as conduits for recruitment (Diani 1995; Gerlach and Hine 1970; McAdam, McCarthy, and Zald 1988; McAdam 1988; Snow, Zurcher, and Eckland-Olson 1980).

As this discussion suggests, political process scholarship has created a foundation for an enduring body of SMO research in two critical areas. The first considers the relationship between SMOs and their external environments. Studies in this area continue to investigate how SMOs respond to changes in political conditions by examining them in a variety of national and subnational contexts (e.g., Carmin, Hicks, and Beckman 2003; Reimann 2001). The recognition that SMOs respond to external conditions implies that they are strategic actors. Accordingly, research bridging the political process and cognitive schools has demonstrated that frames and opportunities are intertwined (Diani 1996; Gamson and Meyer 1996; Oberschall 1996; Zdravomyslova 1996) and that the tactics selected by an SMO reflect beliefs and interpretations of the institutional environment (Carmin and Balsler 2002; Poletta 2002). At the same time, political process scholarship that combines principles and methods from social movement and macro-organization theories is providing emerging insights into field-level dynamics, including how a variety of external factors influence their founding, survival rates, and strategies (Edwards and Marullo 1995; Johnston and McCarthy 2005; Minkoff 1999, 1997, 1995).

The presence and impact of relations among organizations, both as networks and coalitions, is the second stream of SMO research in political process tradition. Stemming from attention to the contexts in which movements operate, political process scholars have elaborated how SMOs serve as channels for collective action. In particular, they have found that the networks that form among diverse SMOs often can facilitate adherence to movements (Diani 1995; Rosenthal, Fingrutd, Ethier, Karant, and McDonald 1985) by linking individuals and collective action (Diani and McAdam 2004). Coalition formation is also facilitated when dense tie exist among SMOs (Diani 2004; Rucht 1996) and when members of these organizations perceive strategic benefits in cooperating (Hathaway and Meyer 1993). While many alliances form within nations, network ties between SMOs also facilitate cooperation across national borders (Bandy and Smith 2005; Caniglia 2001; Keck and Sikkink 1998; Reimann 2001; Smith 1997). Through explorations of networks and coalitions, political process scholars are offering important insights into the political, social, and cultural contexts that enable and constrain SMOs.

### **CULTURAL AND COGNITIVE THEORIES AND SMOS**

Cultural and cognitive theories employ an interpretive lens to understand social movements. Scholars in this tradition argue that movements arise and work within social and cultural contexts that are ripe with meaning. Participants are motivated to join movements, at least in part, because they resonate with their personal values and beliefs. Analyses of new social movements advanced and crystallized this view as scholars noted that membership in the women's, environmental, and gay and lesbian movements, to name a few, often is better explained by identity affiliation than by social class. Movement mobilization is a challenge from this vantage point, especially since identity movements often do not focus on political change, but strive to achieve social, cultural, and economic transformation (Bernstein 1997). As a result, movements must craft identities and frame their goals in ways that not only encourage participation and adherence, but that promote transitions in prevailing societal norms.

Similar to patterns seen in the resource mobilization and political process schools, framing provides a further example of how ideas and concepts used to understand the dynamics of social movements in the aggregate have been applied to SMOs both individually and collectively. Framing is a tool that is used by movement organizations to facilitate interpretation and provide a means for articulating problems, identifying alternatives, and developing a rationale for movement activity (Babb 1996; Snow and Benford 1988). Among their many functions, frames help to connect individuals to movements (Hunt, Benford, and Snow 1994), guide collective action (Snow and Benford 1992), shape understanding of political opportunities (Diani 1996; Gamson and Meyer 1996; Oberschall 1996; Zdravomyslova 1996), and communicate a public identity (Downey 1986). SMOs use framing processes to diagnose situations, generate solutions, and communicate views and positions (Snow and Benford 1988). In particular, they use them as a means to bridge or connect to potential members, to amplify and clarify their existing views and beliefs as well as to shape the beliefs of others, to extend their frame so that it is salient to a broader audience, and to transform the way the organization is perceived either by integrating new views or replacing those that already are present (Snow, Burke, Worden and Benford 1986). While some scholars focus on the functional aspects of frames (e.g., Snow et al. 1986; McAdam 1996), others have looked at how they shape the production and construction of meaning (e.g., Klandermans and Goslinga 1996).

The constructivist turn in SMO scholarship not only provided insight into framing processes, it also directed attention to the cultural facets of organizations. For example, in keeping with Swidler's (1996) notion of culture as a tool-kit, Clemens (1997) studied how the adoption of an extant organizational model provided familiar coordination mechanisms, decreased likelihood of external criticism or repression, and increased legitimacy. Just as cultural factors may influence SMO structures and practices, cognitive and normative attributions also shape the

choices these organizations make. Cognitive attributions refer to collectively held values, beliefs and ideas while normative attributes are the conventional wisdom and shared views that emerge with respect to the practices that members believe are most appropriate in a given situation (DiMaggio and Powell 1983; Scott 1995). While actors may be rational and weigh the costs and benefits of everything from structure to strategy to organizational membership, their practices are still influenced by their attributions and resultant interpretations (Carmin and Balser 2002; Oliver and Johnston 2000; Zald 2000, 1996).

As the discussion of attributions suggests, identity is a central issue in cognitive and cultural studies of SMOs. Collective identity has been used to refer to the shared values, beliefs, attitudes, and norms of behavior that are present within a given social movement (Johnston, Laraña, and Gusfield 1994; Polletta and Jasper 2001; Taylor and Whittier 1992). SMOs have a structure that provides a means for organizing actions and for managing administrative tasks. They also have goals that they seek to achieve and repertoires of action that they employ to realize these ends. At the same time, they have shared understandings, values, and beliefs (Gamson 1996; Jasper 1997). In other words, just as collective identity has been attributed to social movements it also is present within SMOs (Gamson 1991; Melucci 1989).

SMO identity can shape the process through which meanings are negotiated and the ways that members collectively make sense of their physical, social, and political environments (Melucci 1989). For example, Gamson's (1996) study of SMO decisions regarding legitimacy, racial diversity, and survival provides insight into how meanings associated with identity are negotiated, extended, and recreated. Identity also can influence SMO practices. Organizations select tactics based functional criteria such as familiarity, perceived efficacy (Jasper 1997), and the messages they want to communicate to the public (Hewitt and McCammon 2004; Snow and Benford 1988). However, they also select them based on their interpretations of the social and political contexts in which they take action (Carmin and Balser 2002; Meyer 1993a, 1993b), their beliefs, values, and ideologies (Brulle 1994; Carmin and Balser 2002; Dalton 1994; Polletta 2002; Zald 2000), and the meaning that these activities have to the organization itself (Klandermans 1992; Melucci 1988). In addition, identity links SMOs to their external environments and, in the process, can enhance access to resources. For example, by communicating an image to donors and to potential members, identity can promote the flow of funding and enhance staff recruitment (Brulle and Caniglia 1999). It also connects them to other organizations, institutions, and arenas of activism (Clemens 1997).

The emerging body of research rooted within cognitive and cultural perspectives has fostered enduring and important trends in SMO scholarship. Most social movement research is oriented to movement dynamics while much of the research that does focus on SMOs often begins with the assumption that these organizations are simply component parts of movements. As a result, SMOs are viewed in light of their instrumental value to mobilization and to the achievement of movement goals. By attending to interpretative and sense-making processes within SMOs, studies within the cognitive and cultural schools have begun to explore the internal processes and dynamics of these organizations. It is in this domain where we see emerging research on the ways cognitive factors such as ideology, values, and beliefs, as well as on how culture and the production of meaning, can shape SMO practices and relations with their external environments. Attempts to bridge social movement and microlevel organization theory from within the cognitive and cultural traditions offer a promising means for understanding SMOs both as unique types of organizations and as social movement actors.

### CONTRIBUTIONS TO THE SPECIAL ISSUE

The resource mobilization, political process and cultural-cognitive approaches to social movement scholarship have generated both complementary and distinctive insights into SMO forms and practices. SMO research across all three of these traditions has considered the ways

that organizations contribute to movements, offered descriptions of SMO attributes, and examined how these characteristics are related to core tasks ranging from goal formation to strategy and tactic selection to resource acquisition and survival. Though there are commonalities among the different schools, as the preceding discussion suggests, SMO research also tends to reflect and extend the dominant theoretical perspective with which it is aligned. In keeping with this approach, each of the articles in this special issue focuses on SMOs while drawing on and advancing scholarship either within the resource mobilization, political process, or cognitive-cultural stream of social movement research.

Kenneth Andrews and Bob Edwards contribute to studies within the resource mobilization tradition by drawing our attention to the diversity of SMOs that are active at the local level. Rather than limit their study to organizations with a particular structure or set of tactics, they sample all environmental organizations in North Carolina that make public claims. As a result, they are able to provide an overview of the structures, tactics, and discourses being used by SMOs. They find that most nonprofit and voluntary organizations with an environmental focus identify themselves as being affiliated with the environmental movement, including those that are professionalized and rely on institutional tactics. Andrews and Edwards argue, however, that tactics still are an important SMO characteristic. They note that SMOs employing disruptive and contentious tactics tend to be structured more similarly to each other than they are to those groups that do not protest. They further observe that while many groups use a variety of tactics, when compared to those that adhere to more conservative strategies, SMOs engaging in disruptive activities also are more likely to lobby state or national policy makers, participate in partisan political activities, and monitor policy. Although they stop short of providing a definitive view of what organizations qualify as an SMO, their study offers insight into this seminal question while expanding our understanding of SMO structures, functions, and processes.

Shifting from the local to the global, Gillian Murphy examines the impact that network organizations are having on transnational social movement organizations (TSMOs) and on movements generally. At the outset, she notes that global integration has been accompanied by the emergence of transnational social movements and the formation of transnational coalitions. After establishing the importance of coalitions, she draws on organization theory, specifically population ecology, as a means for considering the theoretical underpinnings of field-level dynamics and for tracing TSMO survival rates and patterns over time. Her findings suggest that coalitions are fostering movement expansion. However, as coalitions increase in number, Murphy observes that the rate of new TSMOs foundings decreases. These results, which contribute to political process scholarship, raise important questions about the impact that network organization forms may be having on SMO survival and mobilization.

Jackie Smith asks why newer TSMOs tend to be formed along regional rather than transregional lines. She tests the ability of both political process and cognitive theories to explain this development. Although the regional form is most prominent among Northern SMOs, Southern SMOs had more ties to cross-regional groups and to intergovernmental organizations than were exhibited by groups in the North. Smith argues that these differences are best explained by the institutional contexts in which activists operate rather than to ideological differences between Northern and Southern activists. As a result, in addition to providing insight into the evolution of network structures, the findings from this study also demonstrate that SMOs engage in strategic assessments as they respond to the external environments in which they operate.

Francesca Polletta's article extends our understanding of the internal dynamics of SMOs by demonstrating the impact of culture and symbolism on organization choice. While others before her posited that the shift at SNCC followed significant staff increases and an ideological commitment to the Black Power agenda, Polletta argues that neither of these explanations is accurate. Instead, she maintains that the change was motivated partially by

programmatic uncertainty and mostly by a cultural change that redefined participatory democracy techniques as white rather than black. By tracing the evolution of SNCC from a participatory democracy into a hierarchical bureaucracy, Polletta demonstrates how organizational forms are associated with particular ideologies and identities and, as such, have symbolic properties. She further shows that when the form becomes associated with different attributions and does not support the collective identity, members will strive to make changes so that structure and identity are aligned. These findings suggest that culture and symbolism have a significant influence on SMO strategy and that cognitive and structural aspects of organizations are interrelated.

Debra Minkoff and John McCarthy round out this special issue by noting critical gaps in SMO scholarship, examining emerging ideas and approaches, and offering directions for future research. Their concluding article revisits some of the central findings and theoretical arguments associated with research in social movement organizations, and highlights prevailing assumptions and a several unanswered questions. Initially they take a macrolevel perspective and consider organizational fields and activist labor markets. They then discuss microlevel issues, focusing SMO entrepreneurship, change, and decision making. By taking a synthetic approach, they are able to demonstrate how organizational theory can inform social movement research and, most importantly, our understanding of the structures, functions, and dynamics of SMOs.

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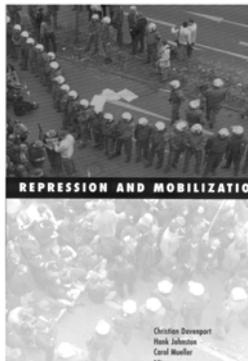
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## Repression and Mobilization

Christian Davenport, Hank Johnston, Carol Mueller, editors



With case studies that range from Germany to the Philippines, the United States to Japan, Estonia to Spain, the authors decisively broaden how the relation of state repression to mobilization is seen. Together these essays synthesize what we know about repression and mobilization and provide thoughtful insight for the future.

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