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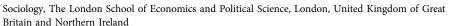**ARTICLE**

When Do Trade Unions Support Universal Demands? Organizational Context and Trade Union Strategies in the US and UK at the Turn of the 20th Century

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Abstract

When do labor movements come to support universal welfare policies? This article examines this question through a comparative account of the British and American labor movements at the turn of the twentieth century. Drawing on newspaper and meeting records from the Amalgamated Society of Engineers (ASE), the Amalgamated Society of Railway Servants (ASRS), the Cigarmakers International Union (CMIU), and the Brotherhood of Locomotive Firemen and Enginemen (BLF) from the mid-nineteenth century to World War I, it considers why, given a common tradition of exclusive benefits, the two movements diverged on the question of universal state health and pension schemes at the turn of the century—with the British labor movement abandoning its voluntarist orientation and the AFL preserving it.

Complementing existing sociological accounts that emphasize state and party structure, sectoral composition, pace and quality of industrial change, and the demographic makeup of labor movements, this article builds on approaches from the sociology of organizations in centering the importance of organizational arenas in shaping trade union strategies and aims. In particular, it investigates the role of friendly and fraternal societies in structuring trade union interests over this period. The article demonstrates how changes within the friendly and fraternal society movement shaped the contextual significance and strategic value of benefit provision in each trade union over time. In doing so, it opens the way for a deeper reflection on the importance of organizational reasoning in shaping trade union organizing and the trajectory of welfare institutions.

Introduction

In the increasingly dualized, liberalized, and sectional labor markets that characterize contemporary societies, the question of solidarity has gained renewed momentum and significance. With the expansion of the service economy and the decomposition of class-based politics, trade unions assume an essential position in mediating the reconstitution of political identities and trajectory of class formation. But as representatives of

particular groups of workers, trade unions exhibit a range of economic and political functions that reflect the diversity of class experiences held by their membership.[1]

This paper is preoccupied with the conditions for trade union universality—that is, the emergence of a solidaristic trade union culture that stresses commonalities among workers regardless of race, ethnicity, gender, or grade level. I approach this question through a historical lens, tracing developments in two of the most closely affiliated labor movements in the Western world. Originating among artisan workers, the British and American labor movements both pursued an exclusive organizing strategy and espoused an ideology of manly self-help, voluntarism, and thrift throughout much of the nineteenth century. Essential to this model was an expansive system of mutual benefit provision. Members contributed a small portion of their weekly earnings toward life insurance, death benefits, healthcare, sick leave, and eventually pensions.[2]

By the end of the century, however, the two movements' orientation toward benefit provision had radically diverged: whereas the British Trades Union Congress (TUC) came to advocate universal, non-contributory state pension and health benefits,[3] the American Federation of Labor (AFL) heightened its commitment to voluntary benefits, breaking with elite reformers in the American Association for Labor Legislation (AALL) and joining forces with private insurance providers to campaign against state initiatives for public benefits.[4]

The divergence is meaningful. When the question of public health insurance re-emerged in the late 1940s, British health and housing minister Aneurin Bevan was able to draw upon and expand the popular National Insurance Act of 1911 in pushing forward the National Health Service of 1948. That same year, US president Harry Truman attempted to establish a minimal public health insurance but was thwarted by a powerful collaboration between the American Medical Association and corporate insurance providers who were deeply embedded within the country's industrial relations system. Similarly, while the UK's 1948 Pensions scheme drew on the foundations of the Old Age Pensions Act of 1908, the United States' Old Age Insurance program remained selective and contributory even as it expanded in the postwar era.[5]

In what follows, I complement existing sociological studies of the British and American labor movements that stress developments in their respective cultural, political, and economic contexts. These shifts undoubtedly altered the organizing terrain within which the respective labor movements operated and contributed toward the overarching divergence: with the AFL progressively taking up sectional lobbying tactics, and the TUC embracing mass mobilization behind the Labour Party. However, I seek to demonstrate that, with respect to benefit provision, the positions of the two federations were guided by a distinct *organizational logic*. Throughout much of the nineteenth century, voluntary benefit provision enabled these trade unions to mimic the far more popular and respectable friendly and fraternal mutual benefit societies.[6] Benefits *legitimated* trade unions before governing officials by symbolizing their voluntarist ethic. They also aided trade unions in *recruiting* from an already organized membership pool.

By the end of the century, the differing trajectories of mutual benefit societies significantly altered the organizational arena within which trade unions engaged—in the United Kingdom, friendly societies experienced a dramatic and protracted period of crisis, leading to a split between the membership and the leadership over the question of state insurance.[7] Faced with this new schism, British New Model unions came to

side with friendly society members in support of state benefits. In the United States, by contrast, the turn of the twentieth century was widely recognized as the "Golden Age of Fraternalism."[8] As fraternal benefit societies gained in membership and recognition, their racialized and segmented organizational model persisted and proliferated. Despite splits within a decentralized AFL, its leadership, headed by Samuel Gompers, would continue to advocate voluntarism until 1930s—coinciding with the decline of fraternal orders.[9]

Though it has been recognized in earlier accounts, the organizational reasoning behind trade union models remains comparatively understudied. In taking an organizational perspective, this research thus contributes to broader discussions on trade union strategy, class formation, and welfare state development.

Varieties of Trade Unionism

Within the literature on welfare state development, comparatively little attention has been paid to diverse forms of working-class organization. According to the power resource school, the expansion of welfare benefits is understood to be the result of a Polanyian "double movement" on the part of workers to resist exploitation by employers. In this model, working-class organizations are positioned as protagonists of welfare state expansion, periodically winning concessions from antagonistic employers.[10] The perspective is taken against the Varieties of Capitalism tradition, which holds that employer attitudes toward welfare may shift depending on the incentive structures posed by particular industries.[11] Institutional accounts have also emphasized the importance of party structure, administrative and bureaucratic infrastructure, and legislative process in influencing the passage of welfare state legislation.[12] Common to these is the assumption that workers and their representative bodies support welfare state expansion—an assumption that is challenged by both labor movements considered in this paper.

Scholars of trade unions and labor movement history, by contrast, have long distinguished between sectional "craft unionism" and radical "industrial unionism," where the former caters to the interests of its own highly paid members and the latter takes a more political orientation resulting from the integration of workers across wage levels.[13] With respect to welfare provision, craft unions are associated with the adoption of exclusive bargaining and lobbying practices, while industrial unions are anticipated to campaign for universal reforms.[14] This division between "craft" and "class" echoes deep rooted debates on the nature of class consciousness and in particular on the conservative leanings of the so-called "aristocracy of labour."[15]

At first glance, the trade union movements' orientations toward voluntary benefit schemes appears in line with this framework—however defined, the mid-nineteenth century TUC and AFL largely represented an upper-strata of the industrial labor force with a powerful craft identity and general aversion to government "paternalism." But upon closer inspection, the association between benefit provision and craft character begins to fragment. Notably, the industrial rival to the AFL, the Knights of Labor, was itself born as a benefit society.[16] And as the following sections demonstrate, the British Amalgamated Society of Engineers came to support universal state pensions just as it grew to form the third largest craft union in the country.[17]

Understanding trade union orientation toward voluntary benefits thus requires a more nuanced understanding of the manifold elements shaping trade union strategies. To be sure, a number of late nineteenth-century developments significantly contributed to the trade union federations' diverging approaches. For one, the victory of the New Union movement and crushing of the Knights of Labor set a precedent that reverberated throughout the countries' respective labor movements.[18] Additionally, the expansion of suffrage rights to working-class males in the United Kingdom prompted renewed aspirations regarding the role of the public in shaping political outcomes.[19]

This was compounded by the approach of the courts toward labor organizing: with the effective legalization of trade unions in 1875 encouraging open political participation for TUC, and ongoing injunctions prolonging hostility to the state within the AFL.[20] The successful implementation of scientific management practices in the United States further divided interests in an already segregated labor market.[21] And for their part, the refusal of the majority white, male industrial labor force to integrate Black, immigrant, and female workers generated deep chasms between the old industrial heartlands and rapidly growing industrial centers like New York, Chicago, and Detroit.[22] The organizational shifts articulated in this article are meant to highlight an underexplored avenue behind these transformations, and shed greater light on the particular logic guiding trade union policies on voluntary benefits.

Systematizing Organizational Form

Social historians have widely recognized the importance of organizational environment in shaping the structure and practices of nascent labor associations. Seminal works by William Sewell and EP Thompson have emphasized the interwoven nature of continuity and change—whereby early labor societies absorbed and perpetuated the language and associational culture they inherited from earlier organizations even as they adapted to a changing economic reality.[23] In local and national histories of the two labor movements, the role of mutual benefit societies in structuring working-class life, and their importance for emerging trade associations, is also commonly recognized.[24]

With respect to the American labor movement, more systematic accounts are offered by Kim Voss and Carol Conell, who conclude that "pre-existing organization can simultaneously help emerging interest groups organize and reinforce the traditional divisions that segment these emerging interest groups."[25] Elisabeth Clemens has also drawn close attention to the role of organizational forms in shaping the political orientation of labor movements. Clemens points to the fraternal tradition as an explicit influence on the political orientation of American trade unions. Her notion of the organizational *form* as *frame* holds that "To the extent that the organizational models deployed by a movement resonate with the repertoires of organization familiar to members of a society, the mobilization potential of that movement is increased."[26]

This resonates with the conclusions of institutional organizational sociologists, who argue that organizational forms are more likely to persist in an environment

that legitimates them—via existing norms, values, and belief systems. By adopting legitimate forms, organizations increase their resources, stability, and survival prospects. Because they engage in an ongoing dialogue with a broader institutional setting, organizations are likely to exhibit strategic change "when the transformation of environmental conditions renders previous organizational strategies and orientations obsolete."[27] By articulating the conditions and advantages of emulation and repudiation, institutional organizational sociology allows us to take a more systematic approach to understanding the relationship between trade unions and surrounding organizations.

This research article aims to demonstrate the reverberation of organizational change within the two labor movements considered. In examining the relationship between trade unions and mutual benefit societies in detail, I aim to illustrate the changing nature of their relationship over time and connect this relationship to their orientation toward state benefits. I directly outline the processes of legitimation and repudiation identified by institutional organizational sociologists. I thereby seek to add qualitative depth to existing accounts and draw renewed attention to organizational reasoning as an avenue for understanding trade union development.

Case Study Overview

The analysis is guided by records from the Amalgamated Society of Engineers (ASE), the Amalgamated Society of Railway Servants (ASRS), the Cigarmaker's International Union (CMIU), and the Brotherhood of Locomotive Firemen and Enginemen (BLF). These trade unions were chosen because of their role as innovators in the benefit providing field, their importance in shaping the leadership, and thus trajectory of their respective labor movements, and the durability of their organizational model.

Emerging in 1851, the ASE is perhaps the most influential craft union in the anglosphere—inspiring a wave of unionization that would mimic its class compromising attitude and extensive benefit system. By the end of the century, it was the highest benefits contributor in the country, and also one of the largest trade unions to survive for more than a century.[28] After ongoing struggles over the launching of its superannuation fund, the union underwent a shift in strategy in the 1890s, under the leadership of new unionist Tom Mann. In a monumental fifty-day delegate meeting, the union recognized the need to organize within and through the state, and committed to opening discussions regarding membership support for old-age pensions. In 1898, the union publicly broke with friendly society leaders in the Oddfellows and Foresters in favor of state insurance.[29]

As one of the key agents behind the formation of the Labour Representation Committee and, later, the Labour Party, the ASRS similarly embodies a transformational era in British Trade Unionism. The first lasting organization of British railway workers, the union was founded thanks to the support of liberal MP for Derby Michael Thomas Bass. This support was conditioned on the union's friendly society features, and the renunciation of any "hostility" toward employers. In the 1880s, the union came under the leadership of Fred Evans, who initiated a turn toward expanding its "fighting" over its "benevolent" features. Under this new leadership, the union progressively came to support state insurance by the early 1900s.[30]

In the United States, the cigarmakers served as the birthplace and testing ground for Samuel Gompers's peculiar "business unionist" line. Boasting one of the first and most expansive system of voluntary benefits of any union in the country, the trade union preserved and strengthened its benefit schemes in opposition to successive attempts at progressive strike action in 1877 and 1886. Throughout the 1890s and early 1900s, it expanded them further, under the conviction that they are the only insurance against membership defections and organizational decline.[31]

An independent but no less conservative tradition was embodied by the Railroad Brotherhoods, who represented the most longstanding organizations of US railway workers until the late 1960s. Originating with the Locomotive Engineers in 1863, the brotherhoods endorsed benefits and disavowed the use of strikes until 1885, when, for a brief period, they were swept into the outbursts led by the Knights of Labor. But after the failure of the strike wave of 1886, and subsequent crushing of the radical American Railway Union during the Pullman strike of 1894, the brotherhoods doubled down on their benefits, preserving a racialized and exclusive organizing model and positioning themselves as agents of industrial peace through the Erdman Act of 1898.[32]

Documenting Divergence

Organized along craft lines, British journeymen's societies were taken over by unions of skilled industrial wage workers by the early nineteenth century. Though they were highly influenced by Chartism, trade federations even at this early stage held that "it matters little who or what may be the men that direct the crazy machine called the state," arguing that "we have nothing to apprehend either from them or their previous legislature."[33]

Friendly societies played an enormous role in the emergence of these trade societies. Until the repeal of the English Combination Acts in 1824, trade unions commonly registered as friendly societies in order to acquire protected status. Under the Combinations of Workers Act of 1825, trade unions acquired an ambiguous status that prohibited "threatening" or "violent" behavior and rendered strike activity highly dangerous. For this reason, acquiring friendly society status continued to offer important benefits. Hobsbawm's early study characterizes them as "centers for collective life," while EP Thompson called them "authentic evidence of the growth of independent working-class culture and institutions."[34]

This was particularly true as friendly societies continued to gain middle-class approval and develop established management policies with the Friendly Society Acts of 1850, 1855, and 1875. The Act of 1855 protected the funds of registered societies so long as their rules were approved with the chief registrar. But this recognition came at a cost: by mid-century, national amalgamated friendly societies increasingly emphasized their allegiance to the throne and their role in reducing reliance on the poor law, strengthening the moral character of working men, and nurturing patriotic sentiment among the working classes.[35] In 1848, the country's largest societies—the Independent Order of Oddfellows and Ancient Order Foresters—obtained full legal protection in exchange for this disciplinary function.[36]

The 1850s similarly saw the solidification of craft societies and their unification behind Victorian ideals of self-help, independence, and hard work. With their benefit

features legalized through the Friendly Societies Act of 1855, trade unions came to advocate voluntarism in all forms. When a Royal Commission was formed to inquire into the status of trade unions in 1867, leaders of the big, amalgamated unions were keen to emphasize their moderate friendly society functions. Testifying to this overlapping identity, the 1869 returns of the Chief Registrar of Friendly Societies included the Engineers alongside the Machinists, Millwrights, Smiths and Patternmakers, Carpenters and Joiners, Operative Bricklayers, and Ironfounders.[37]

The provision of benefits was an integral part of registration through the Friendly Society Acts. Throughout the century, working-class people often combined trade union membership with membership to one or several friendly societies. Patrick Joyce argues that "the individual worker was often a member of [friendly, cooperative, and trade] social worlds, which may be conceived as spheres of social effect, each partly superimposed on the others."[38] So integrated were the memberships of friendly and trade societies that historian Malcolm Chase has argued that a sharp distinction between the organizations obscures a central feature of the industrial worker's world.[39]

By formally recognizing trade unions' right to organize, the Trade Union Act of 1875 affirmed the success of the conservative craft societies at the same time as it opened new avenues for organization. This would become apparent with the explosion of industrial unions catering to low-wage and general workers throughout the 1880s, culminating in the London matchgirl's strike and dockworkers strike of 1889. The influence of the New Unionist wave on working-class attitudes toward state intervention is widely debated—while scholars like Henry Pelling have argued that British workers remained opposed to welfare provision throughout the first decade of the twentieth century, others have argued that they were divided on the question.[40]

What's certain, however, is that after 1880, the leadership of the TUC as well as that of the largest trades in the United Kingdom gradually came to support state welfare provision. In 1889, TUC president R. D. B. Richie declared, "it is beginning to be apparent that the most aristocratic unionist cannot separate himself from the humblest labourer."[41] In the early 1890s, the federation began to advocate for old-age pensions for those whom "trade unions and friendly societies cannot reach."[42] In the 1898 parliamentary committee report, a joint member of the TUC and friendly societies admits that "the functions of the friendly societies should be performed by the state, such that they provide insurance to all the trades."[43] A year later the committee notes, "The majority of workers who are identified with trade unions and friendly societies find the strain on their pockets quite sufficient and have consequently done all that was possible for them to do."[44]

Early US trade unions held a similar appreciation for voluntary organization. Across studies of early industrial towns, benefit associations are recognized to have shaped the organization of artisan, manufacturing, and industrial organizations. Workers adapted to the challenges posed by industrial life through independent institutions, of which trade unions were one manifestation.[45] Beneficiary features were stressed by local associations as early as 1800, though explicit and permanent benefit features would only come into fruition in the aftermath of the Civil War.[46]

It was during the aftermath of the war that American fraternalism gained cross-class popularity and adopted its characterizing features. Across histories of industrializing American towns, fraternalism is cited as a core feature of communal life.[47] Just like friendly societies, fraternal orders served practical, social, and spiritual functions, integrating benefits into a rich body of rituals and festivities. Most representative of the American fraternal form is perhaps the Ancient Order of United Workmen, whose combination of ethnic exclusivity (the order was only open to white men), open class nature, and internal hierarchy would inspire a wave of fraternal associations in a similar model.[48]

Trade union names like the Knights of St. Crispin, Patrons of Husbandry, and the Knights of Labor make explicit reference to the imagery and ritual practices of fraternal organizations, testifying to the societies' overlapping membership and the importance of the fraternal mode in early trade union organization. From its founding in 1869, the Knights of Labor positioned itself as a combined labor-fraternal society, noting that "it retains and fosters all the fraternal characteristics of the one, and the single trade protection of the other."[49] As late as 1882, the knights vote to implement a benefits policy that explicitly competes with that of fraternal bodies.[50] Competition between the knights and existing fraternal organizations was tense throughout the knight's existence.[51]

A similar commitment to benefits was exhibited by the leadership of the AFL. In his own memoir, Samuel Gompers fondly recollects that "In those early years the fraternal or lodge movement absorbed practically all my leisure."[52] Accordingly, Gompers powerfully backs trade union benefits, declaring "Everyone, who is acquainted with my views, knows that I am the advocate of beneficial and benevolent features being incorporated in trades unions; it being my mature conviction that upon such features mainly depends the permanent success of trades organization."[53]

Throughout its dramatic sixfold membership increase between 1897 and 1903, the AFL clung to this perspective. It did so even as it shifted toward active lobbying and campaigning efforts in national politics, first through the national campaign for William Jennings Bryant, and then as a core constituency to the Democratic Party with the Wilson presidency.[54] Despite the emergence of more radical AFL affiliates like the IGWU, the federation insisted that "There is no good reason why our unions should not, apart from their protective, trade, and labor features, become the guarantee to our members for the payment of benefits by reason of illness, unemployment, loss of tools, superannuation, traveling, death," arguing that "Substantial funds once accumulated for provident as well as protective features, will compel better and higher regard for their sanctity by both the public and the bench."[55]

At the 1918 Convention of the National Casualty and Surety Agents, Gompers declared, "I wish that there would be more of that insurance of a fraternal and mutual character."[56] At the social insurance session of the National Civic Federation's annual meeting in April 1920, he stated, "It has come to me that recently some person has declared that Gompers has been won over to compulsory health insurance. I have already made my answer, which is that I am unalterably opposed to it."[57] The position echoed that of the National Fraternal Congress of America, which powerfully rejected any state insurance legislation.[58]

Benefits as Legitimation and Recruitment

In both the United States and the United Kingdom, early trade unions were thus deeply intertwined with existing mutual benefit societies. This was not accidental— the adoption of the fraternal form gave early trade unions greater access to resources and members, thereby increasing their prospects for survival in an overtly hostile environment.

Unlike other forms of working-class organization, voluntary benefit associations were viewed as legitimate by governing elites. In repeated ASE benefit granting ceremonies, local MPs reiterated their pleasant surprise at discovering the extent of benefits the trade unions offered. In one such ceremony, Liberal MP EM Forester observes:

> "The general notion is that [trade unions] are mainly and chiefly organisations of workpeople to resist and content and make bargains with their employers… this general impression, I confess was very much more my impression at the beginning of last week than it is now, for when I came to look into your rules and study them…I found that your work, your operations as a friendly society, and as a benefit society, far exceeded the operations of that department of your society which has anything to do with disputes."[59]

In May of the same year, the MP presenting the benefit hopes the "old spirit of fear and trembling in connection with trade unions was dying out," thanks to the moral function of their benefit provision systems.[60] The following year, MP Thomas Burt defined trade unions "not as fighting societies, but as societies giving relief."[61] This image of trade unionism was eagerly advanced by the ASE and ASRS themselves. At its founding, the ASE held that its benefits were "the lever by which [workers] may raise [themselves] from the precarious position [they] now occupy to that of independent, prosperous, and happy artisans, filling an honourable and useful position in society."[62]

In these statements and others, it becomes clear that the adoption of benefits had a function much broader than the provision of aid. As a symbol of voluntarism, benefits represented a political ethic appealing to the growing industrial bourgeoisie. As an economic principle, voluntarism sustained the myth of the individual producer, whose labor generated social value at the same time as it elevated himself and his dependents. And as a social principle, voluntarism represented class compromise, the unity between civil society and the market, and the naturalization of market exchange as a feature of human activity. In March of 1882, the ASE chairman emphasized that the "rules of the society encourage economy and thrift, and are a guarantee for the respectability and efficiency of its members," reminding members that "Commercial progress depends on enterprise of capitalists as well as intelligence of artisans."[63] Similarly, an article in the *Railway Review* argues,

> "Too much stress must not be laid upon the half-suggestion that perhaps it would be better if the societies contented themselves with the business of trade unions, leaving the work of friendly societies to be accomplished by another organisation. Inasmuch as most trade unions are benefit societies, *they have all of the influence which flows from those bodies*."[64]

Benefits were thus the manifestation of a conciliatory class consciousness that under-mined the hereditary privilege of the old ruling classes at the same time as it reified the work ethic of the Victorian bourgeoisie. Thrift and independence from govern-ment paternalism counterintuitively served to engrain trade unions within parliamen-tary institutions at a time when those institutions were under the almost exclusive influence of the aristocratic and industrial elite.

Similar strategies for legitimation are visible in the workings of the Brotherhood of Locomotive Firemen. Organized in 1873 in Port Jervis, New York, the union drew on an ethic of "labor fraternalism" that adapted fraternal practices to the workplace. Like the Engineers, the Brotherhood relied on these practices to navigate a hostile organiz-ing environment. The Brotherhood's system of benefits originated with its predeces-sor, the Brotherhood of Engineers, in 1866. Over the next ten years, the initial widows, orphans, and disabled members fund had expanded to include a mutual insurance fund alongside sickness and death benefits. These benefits were used to demonstrate the BLF's values of Christian charity, kindness, and work.

At the 1874 convention, the former mayor of St. Louis observed, "I notice by your constitution and bylaws that your organization…is not only charitable but moral in its tendencies."[65] In the following speech, the mayor of Buffalo states, "yours is an institution formed for the mutual protection and assistance of its members, and as such is worthy to be classed among the many charitable institutions of the day… yours is an honorable calling."[66]

This desire for respectability carried an explicit politics of class compromise. At its 1875 convention, the organization declared that "it is not a society for evil purposes… we are beneficial not only to our members, but to railroad companies, the public, and our families."[67] Asked about the organization's position on strikes in 1877, Grand Secretary William Sayre proudly responded, "No. To disregard the laws which govern our land?…We again say No, a thousand times No…Benevolence being the principal object, it is obvious that we are organized to protect and not to infure."[68] In 1880, the grand master announced, "What a glorious work the last assembly of delegates has accomplished when it unanimously resolved to 'totally ignore strikes'…this has gained us the unlimited confidence of our employers, gained us the sympathy of the best classes of people."[69]

Beyond offering protection to industrial workers, benefits were thus strategically adopted to legitimate these trade associations and signal their allegiance to elite values. Additionally, they helped these trade unions attract members who were already active in mutual benefit associations. This was particularly true in industries that were dense with existing friendly or fraternal societies, like those of the British railway workers and the American cigarmakers. Records of the ASRS and the CMIU document the necessity of adopting benefit features in order compete with existing societies.

Across issues of the *Railway Review*, the ASRS leadership appealed to new mem-bers by actively comparing the trade union to friendly societies. A representative advertisement notes:

"The Oddfellows, Foresters, Shepherds, Druids, Hearts of Oak, and numerous other sound sick benefit societies are open to railwaymen, and offer all the advantages that railwaymen's sick societies could do. The Amalgamated

Society, however, is designed to provide help when it is not provided by those institutions."[70]

In a dense organizational environment, benefits enabled the ASRS to draw on the popularity of friendly societies in articulating its own organizational function and appeal.

Similar competition is exhibited by the CMIU. With the union's membership loyal and active in ethnic fraternities, it remained largely overlooked until the mid-1880s. In 1877, an explosive strike wave shook the industry, drawing on contributions from these fraternal groups. After the effort failed due to lack of funds, the cigarmakers adopted a powerful commitment to benefit features. As Dorothy Schneider notes, "One of the CMIU's most important conclusions from the lost strike was that financial security and economic stability had to take precedence over all other concerns in building a stable trade union."[71]

For this reason, the cigarmakers' early records emphasize the importance of benefits for attracting and maintaining a membership base. In 1879, the editor of the union's journal asserted "men of average intelligence will not cling to an organization unless more protection is secured to them."[72] Throughout the late 1870s and early 1880s, members repeatedly wrote to the journal expressing a commitment to benevolent features. In June of 1880, one member urges,

"To make the unions more permanent, with a stable and growing membership, who will not desert the ship in times of storm and danger, they have to be organized upon a protective and benevolent basis. protective in the struggle for a fair days wages, and in securing labor legislation—benevolent in cases of sickness out of work and bereaved by death."[73]

The same year, the organization's vice president observes "the benevolent associations of New York and Detroit represent a large membership who remain outside trade unions for want of protection. Their members do not decrease with the dull season."[74] Within the union, opposition to benefit provision regularly pointed to the existence of fraternal organizations. To this, advocates responded that the union's aspirations ought to be to make members independent of other benefit societies. In 1881, one member noted,

"We are often told that benefits do not properly belong to trades unions, there being benefit or provident societies for that purpose...But when benefits are embodied in the union, there is a certain moral force thereby brought to bear upon individuals who probably do not care to belong to a benefit society."[75]

He continued:

Both [trade unions and provident societies] are created by the desire of individuals to alter [their] conditions; if possible, by forming combinations with others. What follows? While the provident society considers is mission fulfilled as soon

as it is able to pay such benefits, the trades union has hardly commenced its mission.[76]

Whether for the purpose of legitimation or recruitment, the trade unions examined demonstrate that voluntary benefits did far more than simply protect members. The organizational form served to position the unions within a political and cultural environment. In doing so, the model expanded the resources available to these organizations. Crucially, in the case of the United States, the adoption of the fraternal form also embedded its ethnic characteristics deep within American working-class organizations.

Diverging Organizational Arenas

All four of the trade unions examined here drew on an existing system of mutual benefit societies and the moral, cultural, and associational networks that these societies had built. The adoption of voluntary benefits served as a signal of class compromise to governing elites, at the same time as it appealed to workers on the basis of self-organization and common tradition.

At the turn of the twentieth century, the organizational environments of British and American trade unions began to diverge. In England, friendly societies faced recurring financial setbacks and growing divisions between the membership and rank and file. With the radical unionization wave of 1889, they were criticized for their compromising position by leaders who called for open class struggle. These two developments weakened the appeal of voluntarism and pushed trade unions to distance themselves from their friendly functions. Fraternal societies in the United States took the opposite turn, growing in complexity and popularity, and thus continuing to challenge and shape trade union organization.

The Decline of Friendly Societies and the Turn toward State Provision

During the late nineteenth century, British workers were living longer than ever before, and required greater and more frequent insurance benefits to sustain illnesses rather than compensate for death. This was more pronounced among friendly society members, who lived three or four years longer than the average British worker.[77] The societies struggled to meet these demands: A 1897 summary of the Reports of the Chief Registrar of Friendly Societies found that "of nearly every county in England and Wales, only 4% of societies were solvent." The same analysis concluded: "The painful truth must be recognized that a very large number of friendly societies cannot stand the test of a proper valuation; they are in a state of virtual insolvency, and within a measurable distance of actual dissolution."[78]

In the late 1880s, the societies made significant efforts at reform. Both the Ancient Order of Foresters and the Independent Order of Oddfellows rolled out superannuation benefits for members of retirement age. In both cases, the programs ended in failure, with insufficient recruitment among younger members to pay in for the old.[79] The period generated a series of deepening splits between friendly society leaders and members, who increasingly felt their interests deviated from those of the society as a whole.[80]

In the report of the 1886 Committee on National Provident Insurance, workers repeatedly noted their loss of faith in voluntary organizations, and the divisions between themselves and the friendly society leaderships. Asked about friendly society rejection of national pension proposals, a worker responds "That was the opinion of individuals who were officers. The matter had not been put before the membership."[81] A painter from Herefordshire similarly noted,

> We were cautioned by our society, the Foresters, to guard against this scheme of insurance, as they believed it would injure societies…but there was no one at the meeting… that objected to the scheme. They were all in favour of a scheme of national insurance… I think it would be one of the finest things that could happen if you could get it passed.[82]

In the high court of the Ancient Order of Foresters, it was agreed that "care must be taken that the rising generation are not enticed by bribes drawn from the pockets of those who esteem their freedom or forced by legislative compulsion to exchange the stimulating atmosphere of independence and work for an enervating system of mechanical obedience to state management and control."[83] But despite friendly society leaders' efforts to contain the appeal of public benefits, the repeated failures of their own benefits had, by the 1890s, led to widespread disillusionment with voluntary efforts.

In a letter to the editor of *Oddfellows Magazine*, a member notes:

> The Manchester Unity is not in the position to offer superannuation to the public at large, and there is no necessity for it to bear a burthen which belongs to the State… A good many of the public utterances of the leading men in the Unity on the question of State pensions must have raised a smile from those at the top of the social ladder and anything but a smile from those at the bottom.[84]

In 1895, another member writes:

> If the efforts, *and no one denies that efforts have been made*, have failed as a whole, we should frankly admit it, and throw off the assumed opposition to all schemes coming from the outside, and not allow ourselves any longer to be frightened by the self-created bogey of State control.[85]

In response to these growing tensions, the leadership of the engineers declare,

> The fact cannot be disguised that the leaders of the friendly societies, if not actively engaged in opposing state pensions, are at all events generally found in company with those who are so engaged. Surely they cannot fairly interpret the wishes of the members of the societies…We may fairly lay claim to knowing the mind of our fellow workmen on the point, and we have no hesitation in saying that it is entirely in favour of state pensions for old age on a broad basis.[86]

In subsequent reference to the friendly societies, ASE leaders made an active effort to distinguish themselves from the leaders of those bodies and signal their solidarity with the wishes of the working class.

A similar shift was visible among the Railway Servants. In the opening speech of the 1903 convention, the Bishop of London observes:

> In my opinion the state alone possesses the power and the resources for dealing with [old age pensions]. The thoughtful men in both the trade unions and the friendly societies are recognizing this…I am afraid that financial collapse is in prospect for some of the friendly societies, and a serious limitation of trade action will be a heavy price some of the trade unions will have to pay.[87]

Compounding the internal crisis within friendly societies was their perception by the wave of radical new union organizers. An 1889 article in the *Railway Review* aimed to defend the benevolent features of the union from attacks by John Burns and the radical politics of the London Dockworkers Strike:

> It is charged against the Amalgamated Society of Railway Servants that they are mainly a sick and burial fund, and have done very little from a trade unionist point of view, and again that their leaders occupied their time with pettifogging business instead of organising the employees on trade union lines.[88]

During the late nineteenth century, the friendly society form thus entered a period of crisis. As more and more societies were assessed to be insolvent, workers progressively lost hope in voluntarism as a mode of organization. At the same time, the radical politics of the new union movement leveraged the respectability of friendly society benefits against the more established unions with which they were associated. Though other developments are no doubt important, the records exhibit a distinct organizational logic—the association with friendly societies ceased to offer the advantages it once had.

The Expansion of the Fraternal form and Persistence of Voluntarism

Between 1880 and 1920, American fraternal organizations experienced a national boom commonly referred to as the "Golden Age of Fraternity."[89] In November of 1886, 47 of the most significant societies, representing roughly 2.5 million members, combined to form the National Fraternal Congress (NFC).[90] In 1906, NFC member societies represented 91,434 lodges. By 1925, they reached their peak at 120,000 lodges around the country and over 30 million members.[91] In 1920, nearly half of all males over the age of twenty were members of at least one fraternal order. Thus, American fraternities proliferated and strengthened just as British friendly societies began their decline.

Along with this spectacular growth came a renewed commitment to exclusivity. Of the two hundred largest fraternities in America at the turn of the century, roughly two-thirds excluded immigrants and racial minorities.[92] Having early on developed extensive conditions on membership and participation (rejecting Black people, those prone to drink, and those in dangerous occupations under the claim that

they hold a higher incidence of disease) American fraternities expanded and deepened their racist and gendered practices, taking inspiration from the growing insurance industry. At the turn of the century, the organizations adopted heightened and more extensive business practices, replacing the ritual function with commercial concerns over growth and profitability. In many cases, this included the hiring of traveling agents to establish new lodges and sell fraternal insurance around the country.[93]

American fraternities sought expansion and efficiency, and, increasingly, profit. As the larger fraternal bodies hired traveling salesmen, so smaller organizations came to accept that they could not compete for members. Lodges centralized their administration and excluded cities like Chicago and Detroit—which were associated with poorer population health—as well as dangerous industries like railways, mines, and shipping.[94] Within the American Fraternal Congress, representatives begin to emphasize business interests over brotherly cooperation:

> "From the insignificant beginning twenty years ago has grown a system of business exceeded in dimension by but few interests in the country. It began in a gracious spirit of beneficence; it outran its founders."[95]

In 1893, a representative noted that "The [fraternal] system itself did not contain the least resemblance to life insurance; it was benevolence pure and simple," lamenting that "the spirit of competition [now] enters into the work of all beneficiary orders.[96]

The business-oriented turn of fraternal societies shaped the strategies and reasoning of members within the CMIU. The year 1910—in which the Mobile Bill granted fraternal bodies greater public recognition—reflected a deep and persistent sense of competition with fraternal organizations. Describing the CMIU's changing organizational environment, a representative points to "the enormous growth and development of the fraternal orders, with benevolent features in competition with the trades union."[97] In explaining the rise of the fraternal orders, the answer for CMIU members is clear: "Just for the benefits."[98] The conclusion follows: "With the adoption of the best features now embodied in the laws of the fraternal societies by the trades union movement, the fluctuations in membership will be diminished to a considerable extent."[99] And again: "When the trade unions will become as active as the fraternal orders in developing various schemes of a benevolent character…then their growth and development will become irresistible for a higher and better civilization."[100]

A similar sense of competition was felt by the firemen. In 1901, the organization hired an actuary to assist in the strengthening of its insurance features, recognizing that,

> By adopting [disability insurance], we would stand an excellent chance of retaining our young membership as they grow older. We must, however, not overlook one fact: other orders and insurance companies are continually taking in men of all ages…If disability protection cannot be given by our insurance, then members will seek it elsewhere, even at an added cost.[101]

The pages of the BLF magazine increasingly fill with rate comparisons to other fraternal orders. Over the course of the first decade of the twentieth century, they were overcome by the proliferation of cheaper fraternal policies.

This sense of competition went both ways—articles from the *Fraternal Monitor* recognized trade unions as "keen competitors" of fraternal orders.[102] But though fraternal societies recognized that "Trades unions have strengthened themselves by furnishing similar relief to their members and in addition have done effective work in furnishing protection to the unemployed," they also insisted that "The fraternal benefit societies during the past ten years have been endeavoring under the leadership of state supervisors of insurance to establish themselves upon a more permanent basis. The result has been marvellous. In the ten years accumulated assets have increased from twenty million dollars to nearly two hundred and fifty million dollars."[103]

Just as the decline of friendly societies shifted the organizational logic of the engineers and the railway servants, the proliferation and expansion of fraternities perpetuated the importance of voluntarism within the trade union organizational toolkit. In doing so, they also imprinted a segregated, racialized, and exclusive form of organization deep within the American labor movement.

Conclusion

Despite their common voluntarist tradition, the trade union federations in the United States and the United Kingdom diverged on the question of public welfare schemes toward the end of the nineteenth century. What explains the divergence? Based on records from four powerful and durable trade unions, this research article has argued for the importance of organizational arenas in guiding the shift. Drawing on the institutional organizational sociology, it has sought to demonstrate that, beyond protecting industrial workers, voluntary benefits served as a cultural signal that aligned key trade unions with the values of governing elites and enabled them to appeal to an already organized membership base. These advantages of voluntarism would begin to fade in the United Kingdom as a crisis in friendly society solvency led to increased working-class distrust of the organizations, and the New Union movement successfully attacked the politics of respectability in the eyes of the public. In the United States, fraternal orders grew in size and complexity, continually challenging the hold trade unions had over their membership and encouraging the development of new and more significant benefits in the first decade of the twentieth century. The case studies demonstrate how organizational form shapes the resources and survival prospects of trade unions at different historical moments. The organizational arena thus emerges as an important yet understudied avenue for understanding trade union strategies, models, and identities.

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