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When Protests go Virtual: How Organizing Social Protest in Virtual Worlds Changes the Nature of Organizing

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ABSTRACT

In this paper, we introduce a case study of social protest that has occurred in the virtual world Second Life. This case is a labor strike that occurred against IBM by Italian employees and a large European labor union. We begin with identifying the four key elements in the protest organizing process: Identifying Supporters, Organizing and Establishing Hierarchy, Getting the Word Out, and Building Solidarity/Establishing Social Networks. Next, we briefly examine how non-virtual technologies have changed the protest organizing process. Finally, we present our case data and illustrate how moving a protest to a fully virtual environment changes the organizing process. We conclude by asserting that three aspects fundamentally change protest organizing: entertainment, costs, and culture.

Keywords

Protest, Virtual Worlds, Information Communication Technology, IBM, Second Life

INTRODUCTION

Social protest in virtual worlds has received some attention from the academic and information science spheres (Castranova, 2003; Castranova, 2005; Robinson, 2008). Theories and frameworks that were developed for offline protest are often used to explain uniquely online phenomena (McCaughy and Ayers, 2003). While many social movement scholars have addressed the development of the Internet and its role, technology and the Internet are viewed as simply another communication medium with marginal impacts on the theories concerning protest (Kreimer, 2001; Russell, 2005; Wall, 2007). With the growing popularity of virtual worlds, it becomes necessary to go beyond these views about the Internet, virtualization and mobilization.

In this paper, we introduce a case study of social protest that has occurred in the virtual world Second Life. This case is a labor strike against IBM by its Italian employees. After identifying four important dimensions within the protest organizing process, we examine how virtualization changes these dimensions.

Organizing Social Protest

There are four traditional dimensions to the organization of a protest: Identifying Supporters, Organizing and Establishing Hierarchy, Getting the Word Out, and Building Solidarity/Establishing Social Networks (Klandermans and Oegema, 1987; Kriesi, Koopmans, Duyvendak and Giugni, 1992; McAdam, Tarrow and Tilly, 2001; Stern and Fullerton, 2009). These are dimensions are further examined in Table 1.

Identifying Supporters	Identification of leaders, recruiting original core participants, establishing funding, seeking patrons and supporters.
Establishing Hierarchy	With increasing numbers, stratas form. Protest structure, decision-making rights, and control over resources are established.
Getting the Word Out	Publicity and proselytizing, increasing the size and type of participant/supporter population.
Building Solidarity	Creating a sense of shared community, goals, and interests across participants

Table 1. Four Key Elements in Organizing Social Protest [BASIC FORM]

This paper employs a comparative structure similar to those used by McAdam, McCarthy and Zald (1996) and van de Donk, Loader, Nixon and Rucht (2004) to examine how the virtualization of protest alters the nature of protest dimensions. These dimensions were selected from the literature and represent the mobilizing and social structures within social movements (della Porta and Diani, 2006; Garrett, 2006; McAdam et al., 1996). The goal of these four categories is to compare how dimensions for social movements have been impacted by ICTs and how they may change when adapted to virtual worlds (McAdam et al., 2001). In particular, these activities are of importance to protest organizers and remain active dimensions that can be organized, interpreted, and driven by the leaders of a protest.

Identifying supporters involves the selection of leaders, ideals, and a goal for the protest (Loader, 2008). The focus is on activities like recruiting and funding (Kriesi et al., 1992; Minkoff, 1997a). In both of these activities, individuals who may be useful for the protest are identified and drawn into the planning process either as potential participants or as other forms of support (Minkoff, 1997b).

Organizing and establishing hierarchy engages leaders in organizing protest participants to meet changing needs (Jenkins and Eckert, 1986). The leadership must decide on whether the protest takes a similar structure to other protests or forges new paths (DiMaggio and Powell, 1983). Making an organizational path makes the decision-making process clearer but radical changes can have a detrimental effect (Minkoff, 1999).

Getting the word out is the recruiting dimension of protest. Getting the word out seeks to create a broader base of support (Klandermans et al., 1987). Failure at this stage can result in failure of the protest (Klandermans et al., 1987). There are often a large number of movements within a sub-cultural area that are competing for a limited number of participants, being well known benefits the group increasing access to limited resources (Hannan and Freeman, 1987).

Solidarity, or feelings of shared commonalities, is an important dimension to protest. Solidarity is caused when a group makes a connection to another group’s cause (Klandermans, 1992; Strang and Meyer, 1993). This can utilize social networks built upon shared goals or ideals (McAdam and Paulsen, 1993). Solidarity creates important structures that protesters may activate to build support on short notice (Stern et al., 2009).

Protests and Information Communication Technology

Each of the four traditional dimensions above has been altered by the introduction of ICTs into both public use and use for organizing protests (Ayres, 1999; Bennett, 2003; Castells, 1996; Myers, 1994). In Table 2, we identify the four elements and note how ICTs have changed them. The two boxes in yellow are the elements that have experienced the most significant changes.

Identifying Supporters	<i>Change to Online:</i> Increased amount and type of communication. Allows for distant donors and supporters to find organizers, and vice versa. Can also add to an overproduction of messages, overwhelmed supporters and lost messages.
Establishing Hierarchy	<i>Change to Online:</i> Hierarchy becomes less important yet simpler to manage. Much of the hierarchy is encoded into access and control rights within the technologies themselves.
Getting the Word Out	<i>Change to Online: Significant change.</i> Empowered protest organizers to broadcast their own messages to an ever-widening audience.
Building Solidarity	<i>Change to Online: Significant change.</i> The creation and use of online social networks to fuel protest action impacts all elements listed above. Technologies have expanded the size of personal networks and allowed for distant strangers to find commonalities.

Table 2. Four Key Elements in Organizing Social Protest ONLINE (non-virtual)

Identifying supporters is complicated by the nature of ICTs (Arquilla and Ronfeldt, 2001; Hampton, 2003). ICTs can increase communication between different groups of people (Kreimer, 2001; Leizerov, 2000). They are sometimes used alongside offline strategies for organizing, creating a need to balance the influence of the two (Brunsting and Postmes, 2002; Postmes and Brunsting, 2002). With this hybridized nature, questions of goals, ideals, and leaders must successfully bridge the gap between the needs of the online and offline (Diani, 2000; Mosca, 2008; Postmes et al., 2002).

Within organizing and establishing hierarchy, creating a protest organization that is flexible enough to respond to changes remains important (Wall, 2007). However, it has been shown that technology and ICT usage can enable greater efficiency during planning (Brunsting et al., 2002; Wall, 2007). Others have shown that the individuals drawn to these debates often create a confusing mix of messages and ideals (Hill and Hughes, 1998). This creates a pool of views and arguments within the protest that obfuscate channels of communication (Garrett, 2006).

Getting the word out was one of the first technology-induced changes. While traditional media costs limited the spread of protest messages, the low cost of the Internet bypasses this (Bimber, 1998; Riemer, 2003). It is possible to find information about many different and sometimes specialized communities online (McCaughey et al., 2003). Control over presented information allows groups to also create specifically crafted images through the selective representation of information in order to attract a larger support (Hara, 2008; Hill et al., 1998).

ICTs have eased communication and allowed for the creation of community in online spaces, aiding in the development of solidarity and social networks (Arquilla et al., 2001; Loader, 2008). These spaces can easily be used to substitute for real meeting spaces and allow for bonding and camaraderie but are bound by time or space restrictions (Myers, 2000; Russell, 2005). The usage of slogans and symbols allows geographically divided protesters to form a common identity (Kahn and Kellner, 2004; Russell, 2005). Technology acts as a mediator between groups creating an equal sharing of ideas and goals (Hill et al., 1998; Nentwich, 2008).

METHODS

This study employs a case study, which, due to the complex nature of the case, is difficult to separate from its context. This inability to separate action from context allows the case to draw on the richness of data (Yin, 2003). This protest was selected because it occurred in a well-known virtual world and represents a sample of actions over a number of years.

Data collection for all the text articles occurred before, during, and for six month after the event. The interviews involved in this paper occurred between March and June of 2009. One author was an observer on the date of the protest and recorded direct observations and images. They collected information within Second Life but did not actively participate.

This study used sources including: large news websites (eg. CNN, New York Times, etc.), forums related to Second Life, web logs (any that mentioned the protest regardless of focus), general web sites (owned by the unions, Second Life, etc), as well as, interviews with protest organizers. The documents were drawn from 48 websites and 3 interviews. The text-based documents were collected from a keyword search and any links within the documents were saved to find additional data sources. This continued until new sources of data could not be found. This sample of pages was selected to gain as broad a view of the case as possible. They engage with many different stakeholders and viewpoints in regards to the protest.

The majority of quotes highlighted in this paper were selected from the interviews; however, some are drawn from secondary text sources. In these instances, the documents and quotes selected were part of press releases by the protest organizers. These secondary sources were often limited in scope but highlighted the key issues that the protesters wished to disseminate and are very useful for understanding issues or frames that the protest organizers were using, something that interviews after the fact have difficulty recreating.

This study used analytic induction coding. Preliminary codes were developed from the research questions and interview guide. These codes were used deductively in the first round of analysis. After this, an open and selective coding was carried out on each interview and saved page, resulting in a set of themes and categories that emerge out of the data. The data from this case draws upon these coded interview and text snippets and uses discourse analysis to examine the interactions between individual pieces of coded text and the selected topic of analysis.

CASE: ORGANIZING PROTEST IN SECOND LIFE

During 2007, IBM and Rappresentanza Sindacale Unitaria (RSU) were in contract negotiations. RSU asked for an increase of 60 Euros per year, along with other benefits. IBM responded by offering a 6 Euros increase and canceling a yearly bonus of 1000 Euros. RSU decided to stage the first virtual strike, with the help of Union Network International Global Union (UNI Global Union).



Figure 1. Image of Protesting Employees

UNI Global Union's website offered a comprehensive tutorial which covered the basics of Second Life. The instructions also informed people about obtaining and equipping a custom "Strike Kit". In addition, UNI Global Union ran training courses inside Second Life. They enlisted the help of existing union structures within Second Life, under the heading of SL Union Island, to aid the development and deployment of these tools and the strike itself.

The protest took place on September 27, 2007 from 4 am – 4 pm EST. Protest staffers counted 1,853 participants from over 30 different countries. The protest spanned 7 IBM locations within Second Life. During the strike, IBM's Second Life workers did their jobs unperturbed, providing information when legitimately asked. At one point, parts of IBM's Business Centre had to be shut down to lock out protesters.

On October 24, UNI Global Union reported that the CEO of IBM Italy had resigned. On November 5, UNI Global Union reported that a new contract between RSU and IBM Italy had been signed, reinstating the 1000 Euro bonus for 3 years. IBM also agreed to make payments into a national health insurance fund and to continue negotiations regarding other aspects of the contract.

DATA

In this section we present data from our Second Life case. We provide some supporting evidence for each subsection and use as many supporting quotes as space allows.

Identifying Supporters

Virtual worlds expand the communicative nature of ICTs by adding a virtual body. This allows for the active recruitment and identification of supporters. However, the semi-anonymity of avatars is complicating.

One benefit to identifying supporters is how clearly they can identify themselves within the world. In virtual worlds, identifying oneself becomes more about physically showing one's interests. As one eventual organizer states:

Because I had already built a house in SL and started having meetings with trade unions in SL I offered my help and we ended up organizing the whole protest. (Phone Interview, May 2009)

For this individual, their initial involvement and expression of interests was shown virtually within Second Life through the objects they made. This acted as an identifier for them that expressed their interests and centered them as a supporter to be recruited.

Within virtual worlds, avatars possess a form of semi-anonymity. Characters may build reputations with their actions but the person behind the avatar remains unknown. Semi-anonymity can cause confusion as people plan a protest together, only to find out that some of their assumptions are incorrect. One protester came across while organizing the strike:

Are you really a man or a woman? Because my SL avatar is actually a man SL. [laughs] because he felt like that was the best way to represent [my company]. (Phone Interview, May 2009)

To this individual, it was important that they present a male face to the others. However, once an outside connection occurred it became difficult to reconcile the differences. The semi-anonymity granted by Second Life allowed this individual to present a different identity from their physical form that confused others.

Organizing and Establishing Hierarchy

To organize a protest within a virtual world requires knowledge of the external social contexts. Virtual worlds complicate this process by requiring levels of sociality that may harm the organizing process or block organizers altogether. However, virtual worlds do act as a common platform to bring together physically distant and organizationally diverse groups for the good of the protest.

The protest organizers needed to establish lines of communication among coordinating bodies while making sure all of it worked together. As one organizer says:

I think our meetings were mainly organizational. [...] I really was there to make it happen and to think of the strategy to make it happen because we had never seen such a huge event being planned before so we just went through all of the stages how we'd communicate about it. (Phone Interview, March 2009)

The nature of the virtual world and protest action meant that much of the work establishing lines of communication must be built.

The blocking of protesters from the space was an important issue. IBM owned all the sites of protest, allowing them to lock the protesters out. It also allowed for particular individuals to be blocked from the protest sites. As said in an interview on one website:

"We are expecting some very bad reaction from IBM," Barillari said in an interview conducted in Second Life. "I'm sure they will try to do something to limit our demonstration." (<http://www.stuff.co.nz/technology/52660>, Saved December 2007)

An easy way for IBM to limit the demonstration would be to collect the names of the organizers' avatars and lock them out, effectively beheading the protesters. Given the need for order in a protest, having the leaders removed effectively dismantles the ability for the protest to achieve its goals.

Getting the Word Out

Virtual worlds are uniquely situated in regards to getting the word out because of the reduced cost of communication. However, communication lines can become broken when relying solely on virtual worlds. The virtually physical nature of the environment also allows for the creation of objects that may pass along a message without requiring active participation.

The virtual nature of a Second Life protest introduces complications due to the fact that people must be connected to the virtual world in order to communicate with others and attend training sessions or the protest. This was an issue that was faced by the organizers:

We had a bunch [of people] that would appear then disappear, bump into you and then they'd go all black. [...] they tried very hard but were stuck because they couldn't get things they couldn't click, they were only half there, it was a big issue. (Phone Interview, May 2009)

As this organizer states, these individuals could only be half present. They could not engage with others around them in the virtual world. Nor could they gain enough information or access to the virtual world for them to give an accurate understanding of the protest or the training sessions.

The organizers had an advantage in the production of goods and materials. Often signs, shirts, and slogans are purchased or produced by protest organizers. As one organizer explains:

[...] we'd create kits for people and then training courses for these people who don't know how to get into SL. Put on a strike kit (t-shirt and flying fish) above his head or her head. (Phone Interview, March 2009)

These strike kits were packages within Second Life that contained signs, t-shirts, and windsocks that were emblazoned with protest slogans. These were created digitally and did not require money and could be duplicated at no cost. The organizers had everyone wear or display the items in their strike kit. They acted not only as a draw before the protest began but also displayed the information about the protest, pulling in bystanders during the protest.

Building Solidarity/Establishing Social Networks

Virtual worlds add an additional layer of community to existing social connections. Individuals identify with virtual worlds and look favorably upon others who are active in their world. This can help in the establishing of solidarity and social networks by creating a weak link between the protest group and others in the virtual world. This helps to connect to younger or disenfranchised groups but also introduces negatives, such as acting as a turnoff to others who feel that the technical nature excludes them.

Second Life provides a valuable tool for creating connections between different protester groups. It creates a shared interest that different groups can use to find commonalities and then build bridges for collaborations in the future:

So many, many people are having the same problem as I am that I am trying to explain something to older person. But the real good thing is that we are connecting ourselves. So older and younger unionists are trying to work on this topic now. We have a common mettle where we can understand each other. (Phone Interview, March 2009)

As one organizer discusses, the Second Life strike was able to create a shared experience that helped to bond younger and older unionists together.

Organizers stressed over how to make the process of participating as streamlined as possible so that few participants would be lost to problems. The perceived nature of virtual worlds creates an additional complication that must be accounted for by protest organizers. As one individual explained:

And I think one of the concerns was to explain to people that SL wasn't so difficult to apprehend, so difficult to install, so difficult to use. I was surprised to see a number of what we call general secretaries to the top boss of the trade union where normally they are the least likely to be reading their email. (Phone Interview, May 2009)

Within the Second Life case, there was a perception that the software would be difficult to work with at every stage. Some of these concepts come from previous interactions or word of mouth. The word of mouth and existing social networks worked against the protest organizers in this case, spreading the idea that Second Life excluded traditional unionists and discouraging participation.

DISCUSSION

In the section above we have used some of our data to illustrate how virtualizing social protest has changed the act of organizing. In Table 3 below, we briefly describe the changes wrought by the virtualization. We have found both positive and negative changes, from the point of view of the organizers.

Identifying Supporters	<i>Pro:</i> May attract new participants by identifying potential in-world knowledge and presence
	<i>Con:</i> Through avatars, participants can be semi-anonymous. Perception of the Virtual World as frivolous and game-like. Add technical requirements to participation.
Establishing Hierarchy	<i>Pro:</i> New mechanisms of identifying leadership, structure and hierarchy. Creates hybridized social structures between the virtual environment and the protest organization.
	<i>Con:</i> Organizational structure and leadership not obvious to avatar participants. Organizational culture may not be apparent to those unfamiliar with the world.
Getting the Word Out	<i>Pro:</i> Enables the creation of interactive objects as methods of dissemination. Greater ease of communication within the world.
	<i>Con:</i> Poor communication between the virtual and the offline, or other online media.

Building Solidarity	<i>Pro:</i> Existing participants share a culture. Attracts from the young, technically savvy.
	<i>Con:</i> Requires technical expertise and social knowledge to fully participate.

Table 3. Four Key Elements in Organizing Social Protests in VIRTUAL Worlds

From this analysis, we have found that there are three aspects to virtual environments that have impacted the organization of social protest in virtual worlds:

- (1) An air of entertainment
- (2) Lesser and greater costs
- (3) Culture and community

First, Second Life, allows the participants in the labor protest to use avatars that varied from a representation of the actual person to fantastical non-human creatures. These avatars could move in space with some of the physics of the offline world, but could also engage in other magic-like behaviors. There was a playful element to the strike that arose from the culture of Second Life. The actual protest took on an atmosphere of a picket party. These very features of entertainment that arise from using a virtual can often lead to them being dismissed.

On the one hand, the traditional union organization could not place a value upon a system that was so divergent from their methods and values. The union groups involved in this protest were well established and did not align with the relaxed and game-like nature. Traditional media dismissed and ignored the event as a serious labor action and instead covered the story as a youthful spectacle.

On the other hand, this technology appealed to youth who had been disenfranchised by traditional unions. There was an inherent appeal in using technology that they engaged with in their free time to approach work-related issues. It removed barriers of location, social practice, and time, creating a more approachable union. Many unions took advantage of these elements to create a support base within the Second Life.

Second, virtual environments challenged the nature of protest costs by lessening the financial costs and increasing the costs in expertise. Virtual worlds may offer a cheaper way of enacting protest since much of the software is freely available and the initial set-up costs are low. In addition, the availability of computers to many people creates a perceived chance to reach a much larger source of participants.

The lowered cost can be offset by these challenges, requiring organizations to involve more time, effort, and resources into a protest. While recruiting new participants from within the virtual world was made easier, recruiting from the non-virtual environment was difficult. UNI Global Union spent much of their time making sure that all the digital participants had materials they could use. They also went to great lengths to ensure that their non-digital participants had a smooth transition to the virtual world. This level of organization was seen as costly but invaluable by the protest organizers.

Lastly, culture matters. Virtual environments are more than empty virtual spaces into which an offline social protest can be injected. They have regular participants who have imbued it with a culture. This existent culture is an advantage to protest organizers in that it is a ready-made community to provide support and may be motivated to participate. The existing participants are able to facilitate protest organizing simply due to the fact that they have a command of the culture of the space. Not only did the IBM protest in Second Life draw in UNI Global Union members and IBM employees but it also drew in many virtual bystanders.

Conversely, the outsiders to a virtual world will experience culture shock upon entering the virtual world. Not only may the culture be radically different from anything offline, it may be difficult to learn since the cues may not be obvious to newcomers.

CONCLUSION

Virtual worlds offer a new avenue of expression and have the potential to increase the impact and audience of a protest. The IBM case shows that protesters can leverage virtual worlds to create an impact against their target. The nature of virtual worlds, both their novelty and their accessibility, can allow for much smaller protests to reach a larger scale than they could using other forms of media. Within this case, a small union issue was able to garner the attention of a coalition of unions and the press around the world.

The IBM example was the first of several union strikes within Second Life and acted as a proving ground for the concept of the virtual strike. While there have been several strikes within Second Life, these challenges remain relevant to each one as they must be addressed each time the protesters take to this medium. While some responses may become standardized over time, virtual world protests are still new enough that customized responses are often created or re-created each time a protest occurs. The value of virtual worlds as a site of protest is balanced against the organizational challenges of operating novel environment.

As virtual world's audiences diversify there will likely be more collective action. People and their avatars may be drawn into new forms of mobilization. Leaders of offline organizations may turn to virtual worlds to recruit new followers, indoctrinate and train adherents, support their organization, and stage protests and demonstrations. Companies that host these worlds will need to become aware of not only their audience but also how that audience will mobilize. Law enforcement will also need to develop new understandings as virtual world technologies enable behavior that may be labeled as deviant, anti-social and criminal. It is essential to build on the research exploring protest action in an offline setting and note the changes and implications of moving those behaviors into a virtual setting.

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