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Editor-in-chief: **Iga Maria Lehman**

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Preface

Leadership as a Relational and Discursive Process: Exploring Rhetorical and Material Dynamics

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Building on an ontological and epistemological shift away from the essentialization of leadership (Grint, 2000), the works in this issue expand the understanding of leadership as a discursive, co-constructed, and materially influenced phenomenon. The concept of discursive leadership challenges traditional views that focus on individual characteristics or static organizational structures. Instead, it emphasizes leadership as an ongoing process shaped by rhetorical and material dynamics. Fairhurst and Uhl-Bien (2012) highlight how leadership is deeply embedded in socio-cultural and material environments, where interactions between leaders and followers are co-constructed. Rhetoric

plays a pivotal role in shaping these interactions, guiding how leaders influence attitudes, build consensus, and motivate action. In this light, rhetoric is not simply a tool for persuasion but a mechanism through which leaders and followers jointly create meaning.

Understanding leadership through the lens of the rhetorical situation further emphasizes the complexity of this relational process. According to Bitzer (1968), the rhetorical situation comprises the relationships between the speaker, the audience, the purpose, and the surrounding circumstances. In leadership, this requires considering audience's needs, the leader's credibility, and the socio-cultural and institutional environment to gauge the effectiveness of communication. Leaders must skillfully navigate ethos (credibility), pathos (emotional appeal), and logos (logic) to align individual goals with broader organizational objectives. By doing so, they can resolve conflicts, articulate visions, and foster relational cohesion.

To fully grasp the complexity of the rhetorical situation in which leadership is enacted and perceived, it must be viewed as a discursive-material phenomenon emerging from both human interactions and the interplay of objects, environments, and technologies. In organizational contexts, both human and non-human actors—such as technology and institutional frameworks—shape the delivery and interpretation of messages. Actor-network theory (ANT) scholars explore this intricacy by recognizing a broad range of participants, or "actants," who can be human or non-human (Fairhurst & Cooren, 2009). These actants exert agency through both human actions and material influences, collectively shaping communication and outcomes (Latour, 1986).

Leadership as a relational and discursive process aligns with a broader body of research emphasizing the interconnectedness of leaders and followers (Fairhurst & Uhl-Bien, 2012). For instance, Drath et al.'s (2008) "direction, alignment, commitment" (DAC) framework shifts the focus from individual leaders to collective processes, proposing that leadership emerges from a group's ability to create shared direction, align efforts, and commit to collective goals. Adding to this, Lehman (2024) offers a new perspective by proposing that academic text creation can also be viewed as an act of leadership. She argues that effective scholarly communication involves the skillful use of rhetoric to

engage readers – essentially positioning them as 'followers' – and to negotiate meaning within a specific socio-cultural and disciplinary context.

However, rhetoric does not merely respond to context within which the audience is subsequently led – it also constitutes it. We know, for example, that the invasion of Iraq in 2003 by the Anglo-American military alliance was premised on the existence of Iraqi Weapons of Mass Destruction (WMD) and the ability of Saddam Hussein's forces to deploy missiles in 40 minutes. But no WMD were subsequently discovered, nor have any ever been found since, so the context which legitimated the invasion – the crisis – was socially constructed by the two protagonists that sought the removal of Saddam, President Bush and Prime Minister Blair. Of course, we still do not know whether there will be discoveries of WMD, but that is the point – the supporters and opponents of the invasion both constructed the context to suit their political aims – but only one of these rhetorical constructions was successful (Grint, 2005, 2024, pp. 669–698). Or to take another example, the 'Gleiwitz Incident' on the night of 31 August 1939 was a German False Flag attack upon the German radio station situated close to the border with Poland by German SS officers dressed in Polish army uniforms, and it was this that provided Hitler with the excuse to invade Poland in 'self-defence' (Zaloga, 2002). In effect, these social constructions, that are always rhetorically embedded, run contrary to contingency theories that purport to suggest that it is the context which determines what leaders ought to do. In this alternative approach, we can see how the context – in itself – is also part of the social construction and not something outside of its rhetorical formation.

Along these lines, Foucault (1976/1979) argues that discourse has both productive and regulatory power: it not only shapes thought but also frames certain claims as "truths," marginalizing alternative perspectives. This productive and regulatory power of discourse is evident also in academic environments, where Anglo-American rhetorical standards often dictate how scholars, especially those for whom English is a second (or third or fourth) language, express themselves (Boussebaa & Brown, 2017; Cloutier, 2016). Adhering to these norms often leads to substantial shifts in authorial self-representation, shaping the nature of the relationship with the reader (Lehman & Tienari, 2024).

The contributions in this volume highlight the diversity of perspectives and methodological approaches that can be applied to discursive leadership. Janne Tienari and Paul Savage's "Leadership and Humor, the Moomin Way" explores how humor functions as a discursive tool within organizational leadership, revealing how it both enables and challenges the relational aspects of leadership practices in a context shaped by Moomin values. The Authors examine how humor operates as a double-edged sword, fostering connections yet also generating tensions within organizational interactions.

Michał Szostak, in his contribution "Phenomenological perspectives in dialectical leadership: Influence of aesthetic experiences on managing organisational complexity and paradoxes," turns to aesthetic experiences to explore how leaders' sensory and emotional perceptions influence their capacity to navigate the paradoxes and complexities inherent in organizational settings. This article underscores the subjective and embodied dimensions of leadership, emphasizing the importance of multisensory engagement and aesthetic judgment in fostering creativity and resolving tensions.

Gail Fairhurst and Spencer Hall's contribution, "Discursive leadership and material concerns: The union context," provides a comprehensive review of discursive leadership in union leadership contexts. Their study identifies critical material themes, such as economics, bodies, and technology, and shows that these material elements are vital to understanding leadership discourse in unionized settings. This article encourages further exploration of how discursive and material forces intertwine in the shaping of leadership practices.

Finally, Piotr Cap's article "Faces of populism in the rhetoric of governance in post-2015 Poland" provides a critical analysis of populist leadership discourse within the context of Polish politics. Cap examines the contrasting discursive strategies employed by the ruling Law & Justice party and opposition parties in the lead-up to the 2023 elections. His study reveals the power and longevity of polarized populist discourses in sustaining political leadership, while also suggesting that such rhetoric risks exhaustion over time, opening the door to more pragmatic and forward-looking leadership approaches.

Collectively, the articles in this issue illuminate the myriad ways leadership is co-created through discursive practices that are relational, context-dependent,

and culturally situated. We invite readers to engage with these contributions and to reflect on the implications for leadership research and practice, particularly in light of the growing recognition that leadership is not simply about individuals in positions of authority, but a complex social construction continuously shaped through discourse.

We would like to express our sincere thanks to all the contributors for their insightful and innovative work, as well as to the reviewers for their thoughtful feedback and guidance. We hope this issue stimulates further exploration into discursive leadership and inspires new research that bridges disciplines and methodologies.

Iga Maria Lehman,
WSB University, Poland
iga.lehman@wsb.edu.pl
ORCID ID: 0000-0002-2092-8119

Keith Grint,
Warwick Business School, Great Britain
keith.grint@wbs.ac.uk
ORCID ID: 0000-0002-5796-8990

Warsaw, October 2024

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Articles

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Janne Tienari

Hanken School of Economics, Finland

jtienari@hanken.fi

ORCID ID: 0000-0002-2605-2760

Paul Savage

United Arab Emirates University, United Arab Emirates

savagepd@uaeu.ac.ae

ORCID ID: 0000-0001-6707-1047

Leadership and Humor, the Moomin Way

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Abstract: Drawing on an ethnographic study in the Moomin business we explore how a discourse on humor enables organizational members to enact a particular form of leadership. While the Moomin heritage and philosophy steers leadership towards supporting and caring for people and respecting their differences, the relational and contextual nature of organizational interactions renders leadership and humor subject to friction and tensions. We elucidate how humor plays out between leaders, in meetings, in supporting people, and in parties, and how humor is constantly on the edge. Our study contributes to understanding leadership as discursive practice steered by humor.

Keywords: leadership, practice, discourse, humor, Moomin

Introduction

How can leadership be done in and through humor? In this paper, we view leadership as interaction and practices (Crevani et al., 2010; Fairhurst & Uhl-Bien, 2012) and explore how a particular discourse on humor enables organizational members to enact leadership that supports and cares for people and respects their differences. We show how humor plays out in organizational interactions that are contextual. Humor comes with some edge, however, and renders leadership subject to friction and tensions.

For studying leadership and humor, we engage with the Moomin business (see moomin.com). Moomins are amiable troll creatures with pear-shaped faces who live with their friends in the Moominvalley. The Swedish-speaking Finnish artist and writer Tove Jansson created the first Moomin images and stories in the 1940s and soon expanded into comic strips and animation films. She created a unique world of happiness, equality, rebellion, and adventure. Tove Jansson's stories and images continue to give people comfort and joy and her heritage lives on in the Moomin business. At its core is Moomin Characters Ltd, the company responsible for Moomin copyright supervision. Offering comfort and joy has turned into a profitably growing business with over 800 licensees and a global annual retail value of close to a billion euros.

Moomin business is based on corporate values of love, equality, and courage. These values help steer activities and practices in the organization in the spirit of Tove Jansson. In this paper, we draw on an ethnographic study in the Moomin business and focus on how humor plays into its leadership. We find that like in Moominvalley, witty and wild humor keeps life interesting in the Moomin business, enabling the organization to support and care for its people. Based on our study, we argue that leaders use humor to achieve multiple and sometimes contradictory ends, and that the consequences are not always as expected. We apply a discursive approach to leadership that is both appreciative and critical.

The remainder of the paper is structured as follows. Next, we share the theoretical and conceptual underpinnings of our study. We then introduce Tove Jansson's legacy and the Moomin business, before outlining our study. We offer glimpses of leadership and humor the Moomin way and discuss the implications of our study for understanding leadership as discursive practice steered by humor.

Leadership and humor

We are interested in how leadership activities and practices emerge in social interaction and how institutionalized notions of leadership are brought into these activities and practices (Crevani et al., 2010). We view leadership as collective in that it resides in interpersonal relationships rather than individuals (Ospina et al., 2020). It is grounded in discourse and communication as it centers around meaning and meaning making, and it is a site of contestation as well as agreement (cf., Fairhurst & Connaughton, 2014). We are especially interested in mundane manifestations of leadership. These are often "extra-ordinarized" when done by individuals who are designated leaders (Alvesson & Sveningsson, 2003). Like Tove Jansson and the Moomin business, however, we are suspicious of heroic leaders and take distance to viewing leadership as something that only individual leaders do. Our focus is on how organizational members do leadership together, and how a specific discourse on humor helps to steer it. Discourse is

understood here as established and taken for granted ways of making sense of experience in an organization (cf., Foucault, 1972). We hold that specific socio--cultural conditions (e.g., Tove Jansson's heritage in the Moomin business) give rise to discourse that helps make a particular form of leadership possible. Rather than looking at leadership discourses (Koivunen, 2007), discourses of leadership (Ford, 2006) or discursive leadership (Fairhurst, 2008), we study how discourse on humor plays into leadership as joint activities and practices.

Humor is arguably a timely and relevant lens to study leadership. As human beings, we can accomplish a lot through humor in our relations and interaction with others. Humor can be used to make a point or to test ideas. However, it can highlight inconsistencies, ambiguities, and contradictions in the organization (Hatch & Ehrlich, 1993) and it can help us deal together with the paradoxical situations that we face (Jarzabkowski & Le, 2017). Humor helps us let off steam. It can be used to reduce stress, enhance group cohesiveness, and foster creativity (Romero & Cruthirds, 2006). It can be used to express taboo feelings and impulses (Fineman et al., 2000) and to reframe situations and to negotiate identities (Martin, 2004). Subversive humor can confront serious issues in a playful way. However, humor in organizations can also be spiteful and hurtful (Plesner, 2015).

There is a plethora of practitioner-oriented research to support the idea that good leaders have a sense of humor, and that humor enhances leadership. Stanford University scholars Naomi Bagdonas and Jennifer Aaker, for example, argue that humor is one of the keys to great leadership because sharing a laugh accelerates feelings of trust, closeness, and comfort (Constantino, 2022). Leadership researcher and edutainment entrepreneur Emilia Bunea argues that people trust funny managers, that they are often seen as better leaders, and that they increase work engagement in organizations (Bunea, 2022). It is notable that much of the research on humor and leadership comes from the field of psychology with a focus on leaders as individuals rather than on leadership activities and practices. For example, leaders using positive and self-deprecating humor are found to enable effective leadership (Gkorezis & Bellou, 2016) and to foster employee creativity (Huang, 2022). As such, humor is understood as a "key interpersonal resource" for individual leaders (Cooper et al., 2018).

However, in keeping with our understanding of leadership as practices (re)constructed in interactions, we note that humor plays into, and draws from, power relations in organizations. Humor is not only about socio-cultural conditions that give rise to specific discourses, but about dominance and submission as well as inclusion and exclusion. While management can use humor to exert control over the organization (Plesner, 2015), humor can also challenge management by facilitating effective forms of resistance under a protective cloak of ambiguity or anonymity (Rodriques & Collinson, 1995). However, while oppositional humor may appear subversive, it can also reinforce existing power relations in the organization. Humor can be both the prerogative of those in authority and a vehicle for resistance (Fleming & Spicer, 2003). As such, it has a dualistic dynamic nature (Westwood & Johnston, 2012) that begs for contextual understanding. We study humor as something shared that plays into leadership as it is enacted. A specific discourse on humor can contribute to an institutionalized notion of leadership in the organization; deeming what can and cannot be done (cf., Crevani et al., 2010). We find, for example, that Tove Jansson's legacy steers what kind of leadership becomes possible at Moomin and helps determine what is out of bounds.

In all its incarnations, humor is notoriously difficult to analyze. When analyzed it can become annoyingly serious. Writer E.B. White famously remarked that "humor can be dissected, as a frog can, but the thing dies in the process and the innards are discouraging to any but the pure scientific mind." We aim to avoid seriousness in our study of leadership and humor in the Moomin business and to keep the humor alive in all its messiness.

Tove Jansson's treasure trove for Moomin leadership and humor

Tove Jansson (1914–2001) was an artist who embodied a rare but powerful combination of skills: she was both visually and textually gifted (Westin, 2014). In the 1940s, Jansson created the Moomin characters, their friends, and the idyllic Moominvalley where they all live. In Jansson's stories, Moomins

function as a collective. They live in harmony with nature, and they welcome all visitors to their home. Sometimes their adventures take them far beyond the Moominvalley, but they always come back. They meet strangers and befriend them, home and away.

The Moomins convey a powerful message in a world that is characterized by sadness and violence. Moomins are on the side of those who are small and vulnerable. Everyone is different, and everyone is accepted as they are. However, respecting difference comes with some edge as Moomin is also about positive rebellion. Things do not always play out neatly and the Moomins deal with a variety of hardships and emotions in Tove Jansson's stories. They struggle but they eventually solve the problems they face. Rebels are part of the story fabric, and they blend into the community.

The Moomins and their philosophy have attracted scholarly attention. For example, the linguist Christian Matthiessen (2022) argued that in her Moomin stories Tove Jansson provides us with an enlightened understanding of the family that is caring and inclusive. Writer and philosopher Jukka Laajarinne (2009), in turn, carved out what Moomin characters and stories can offer for us in figuring out questions related to ourselves and our experiences. He portrayed the Moomins as therapeutic.

Delicate balancing acts between conformity and resistance depicted in Tove Jansson's Moomin stories can be found in all societies. The Moomin family and friends are based on archetypal figures. Their relations and interaction, sometimes arguing and quarrelling but always making up, are key to the stories. As such, the Moomins communicate a universal storyline. As a guiding light in life, the message of equality and friendship endures. It can be discovered and rediscovered time and again in different societal and cultural conditions. The Moomins also deal with injustices and loneliness in ways that we can recognize and identify with. We can find ourselves in the Moomins.

Moomin business values of love, equality, and courage are grounded in Tove Jansson's work and spirit. As an artist and writer, she had business acumen. She founded what became Moomin Characters Ltd together with her brother in 1958. Today, the company is responsible for Moomin copyright supervision. Moomin is a worldwide registered trademark with over 800 licensees that are allowed to use

the Moomin brand for a set time (typically 2–3 years) in their products, services, and campaigns. Moomin licensees range from manufacturers and publishers to theme parks, and from animations to apps. Almost 50 percent of the licensees are based in Finland and the Nordic countries. There are some 260 licensees in Japan, which is an important market for Moomins since the 1960s. In sum, the Moomin Characters business is about developing and selling the Moomin brand and protecting it from wrong uses and associations. Around 100 new licensing agreements are signed every year.

Rights & Brands, founded in 2016, is a company that deals with all aspects of character representation and branding, from publishing and public relations to licensing. It is the licensing agent for Moomin Characters, working with Moomin licensees around the world. The Moomin "business ecosystem" also comprises other companies apart from Moomin Characters and Rights & Brands (Savage & Tienari, 2024). Moomin is a family business, with Tove Jansson's niece Sophia Jansson as majority owner in Moomin Characters. Sophia Jansson's husband Roleff Kråkström is its CEO. Roleff, known as Rolle, is part owner of Rights & Brands alongside, among others, Moomin Characters. We refer to Sophia Jansson and Roleff Kråkström as "top decision-makers" below. Others include Sophia's sons Thomas and James Zambra, who both have prominent positions in the Moomin business.

We find that Tove Jansson's legacy encourages a form of leadership at Moomin that is caring and supportive. She also offered a grounding for a discourse on humor. Tove Jansson exhibited a curious mix of humor and melancholy in her work. Her humor did not deny sadness or grief. It was often found between the lines, taking the form of irony and parody. Tove Jansson's humor showed the importance of love, equality, and courage in how we interact with each other, comprising what we call the Moomin way.

Studying the Moomin business

Our study of Moomin is based on a variety of empirical materials. First, with Moomin Characters Ltd as his home base, the second author observed

the business and its management for more than two years, hanging around the workplace and attending its meetings and workshops online and offline. He interviewed a total of 54 people in different organizational positions from managers to employees, and partners to suppliers. Also, the second author sat in 32 meetings ranging from two to 74 participants, and had numerous informal conversations with managers, employees, and stakeholders at Moomin Characters and other companies in the ecosystem. The second author developed close ties with key decision-makers at Moomin and took part in social functions and parties they organized, including birthdays and seasonal festivities. He had access to the weekly calendar of the management, as well as the agendas of meetings. The second author's ethnographic study enabled us to get a sense of how the Moomin ecosystem and organization functions, how it is managed and led, and how it is experienced by those who are a part of it. The first author remains an outsider to Moomin.

Second, we collected other materials on Moomin. The second author collected books, visual images, videos, documents, and artifacts, with access to historical documents, the artist's correspondence, her artwork, the merchandise warehouse and archive, exhibition materials, publications of and related to Tove Jansson, and all that the company had available. The first author searched the internet for materials on Moomin, including interviews that its key decision-makers gave for different media outlets across the world; feature articles by journalists and writers covering different aspects of the Moomins and the Moomin business; and social media materials by a variety of posters and commenters. Complementing the ethnographic study, these materials comprising texts and visuals enabled us to get a sense of how the Moomin brand was appropriated in different forums and how the Moomin business and its leadership looks when viewed from the outside.

In this paper, we focus on leadership and humor at Moomin Characters Ltd. As the pinnacle of the business ecosystem, the company has around 70 employees. It is characterized by an informal atmosphere and a lack of explicit hierarchy. In the second author's ethnographic materials we located instances where humor surfaced and where it seemed to play a pivotal role in how the events and situations unfolded and in how leadership was done

together to achieve things. We considered how leadership was done when a decision was reached, when a solution was found and, for example, when an organizational member was supported. We approached humor as a discourse, paying attention to its recurring features; how its specific forms were established and how it steered activities and practices (cf., Foucault, 1972). We studied how its dominant forms were justified and how alternative forms of humor were addressed. We considered parallels to Tove Jansson's work and humor, and how her legacy seemed to be reflected in relations, activities, and practices at Moomin Characters.

Our study is inspired by hermeneutic phenomenology and, drawing on the work of philosopher Paul Ricoeur (1981) and others, the idea that understanding a part requires understanding the whole, and vice versa. Sometimes we researchers may overlook elements such as non-interview data, our influence in the settings we study, and the contextual background of our observed phenomena (Hansen et al., 2023). Throughout the analysis, we attempted to get beyond simplistic understandings of observations, interviews, documents, and other materials. We discussed the various empirical materials and our interpretations of them, and jointly developed an understanding of the Moomin business and how it is managed, before focusing on leadership and humor. With an emphasis on observation and interviews, the second author revisited the materials from this perspective. He extracted events and instances where humor seemed to play a role and, together with the first author, interpreted what was going on and why.

Our process of discovery and hermeneutic cycle of deepening understandings is grounded in our different positioning vis-à-vis Moomin. Through his ethnography, the second author became a sort of insider to the organization in that he befriended its people and continues to mingle with the key decision--makers outside his study. This reflects an effort to appreciatively understand the study context and the worldviews of those being studied (Robinson & Kerr, 2015). In contrast, the first author remains an outsider to Moomin with no personal connections to any organizational members. The insider-outsider dynamic enabled us to engage in a dialogue of different "readings" of what was happening at Moomin. Relying on our reasoning and reflexivity helped us

develop an increasingly in-depth understanding of how leadership worked (for example, through humor); how organizational members behaved and felt, and how they ascribed meaning to their own behavior and feelings, and to those of others (Alvesson & Sköldberg, 2018; Einola & Alvesson, 2019). Of course, other readings of Moomin business, management, leadership, and humor are possible. Our study is not exhaustive or exclusive.

Glimpses of leadership and humor, the Moomin way

We witnessed a lot of humor in how people relate to each other at Moomin Characters. This could take different forms. Spontaneous humor could lighten up a conversation over a cup of coffee, in a meeting, or at a workshop. An appropriate humorous remark could unlock tensions or take the discussion forward or to a new level. Humor could help organizational members to reach decisions and find solutions to a problem. In interviews with the second author, they could revert to humor in describing their experiences – and they could share further examples of humor in how the organization functions.

Next, we elucidate how humor plays out between leaders, in meetings, in supporting people, and in parties. We also show how humor is constantly on the edge, at times contributing to friction and tensions. Our examples demonstrate how leadership comes into being as discursive practice steered by humor at Moomin Characters.

Between leaders

Top decision-makers – or leaders, viewed in a traditional sense – in Moomin Characters do not have standard resumés for corporate bigwigs. They have backgrounds in teaching and publishing, for example, and they are not burdened by established understandings of how businesses should be run. The second author witnessed how the atmosphere they help create in the organization is informal and friendly. Like the Moomins and their friends in Tove Jansson's stories, they sometimes argue and quarrel but always make up.

The second author noticed in his ethnography how the leaders defer to experts in the organization, and often do so through self-deprecating humor. Many of his interviewees referred to Roleff or Rolle the CEO by occasionally signaling the jovial nature of his bearing mixed with respect for his business acumen. Laughing and rolling their eyes, they nonetheless deferred to him when he was determined. They also told the second author that they felt the humor sometimes went too far or cut too close to the bone. This humor set the tone for leadership that could be both jovial and rough.

The way top decision-makers at Moomin Characters relate to each other with respect and love, tempered with a slightly antagonistic sarcasm from time to time, was difficult for the second author to understand in the beginning. Leaders openly banter with each other in front of others, and if one wanted to worship or admire Sophia the board Chairperson or Rolle the CEO beyond common sense, it would be difficult to hear. They take to heart a Tove Jansson character's quote, "You can't ever be really free if you admire somebody too much" (Jansson, 1964/2018). They do not agree on everything and real disagreements, if not handled at home or in private, were direct and absent of the ambiguity humor can offer.

However, humor surfaces in the leaders' relations and interactions often, particularly in moments when disagreements were not important enough to warrant clear language and where the subtext was, "You will do what you want anyway, and I cannot be bothered about this." Top decision-makers at Moomin help each through failure stories both personal and professional, that may not have been funny at the time, but become so in the re-telling. It is keeping them honest, in some way, as if by saying, "I know you. Blemishes and all." By disagreeing with the idea but joking with the person, there is an underlying admonishment that this matter is now on your shoulders, and you will be held accountable. In a constructive way, they are offering freedom and trust but with a burden.

There is also a similar self-narrative of acknowledging the blemishes in a humorous way, as Sophia mentioned in an interview with the second author, "I've always had an inflated ego and thought I was capable of more than I actually am, which has served me well in many situations, but has also had [bursts into

a laugh] its repercussions on what I've done." For us, this felt genuine. In one conversation with one of the leaders of the organization, the second author referred to something another leader said, and the response was, "Yes. I've heard that a lot, and I always think, 'yeah, yeah, that'll happen someday' [laughs], but that's not what should be driving us." It concerned a quite serious question about the vision of the company, but it felt to us that they were saying, "I disagree but it's not so important after all."

As one person in the leadership team said, "It's not meant to be boring for anyone, but some days it is for all of us. It is a job. And that is part of Rolle's intuitive genius, that he keeps everybody interested, everybody kind of following like [continues in a playful voice] 'Where are we... where are we going now?' and so far [knocks on the table] there is no intrigue or people being vocal about their role." We felt that this was recognizing that Roleff the CEO can be difficult to keep up with. By the same token, putting on an animated voice, being a bit lost, is a lighter version of uncertainty. They add that, despite the pace, people do not seem unhappy at Moomin.

In reference to who speaks on behalf of Moomin, Sophia's son Thomas, or Tom, who was in a business development role explained that it is (or was at the time of the interview) Sophia and his brother James, and then maybe after them Roleff and Tom and others. When asked why it was so, he elaborated on the fact that Moomin is a body of art so there is a separation somehow between the artists (Sophia and James) and the business (Roleff and Tom), "I mean, it's not like the business is saying [switches to a villain voice] 'Let's sell to Disney!' and the artists are saying, 'Let's only publish the books!'... and in the end if Sophia feels strongly about something being true to the brand, she will decide." Tom's humoristic portrayal of himself and Roleff as "villains" is a legitimate expression of the eternal struggle in a business based on art, and their commitment to protect the brand by deferring to the artists.

Ultimately, until retirement and perhaps even afterwards, Sophia and Roleff can make the final decisions. Both admit to being frustrated from time to time, but they seem to use humor to lessen the impact of their power. There is an appreciation of the irony of leadership or the serendipitous nature of coming into a position of leadership and this is often expressed in humorous

humility. In many ways, we see this discourse to be steered by Tove Jansson's legacy.

In meetings

There are recurring activities – practices – that put structure around work at Moomin Characters and set the tone for its functioning. Monthly meetings that all employees are welcome to attend form one such established practice. The second author noticed in his ethnographic study how humor is very much present in these meetings, reflecting a sense of equality and friendship that can be found in Tove Jansson's stories. Everyone is allowed to be humorous, and everyone's humor is at least tolerated, if not always directly appreciated. Meetings with everyone present offer a setting for shared humor, jokes, and laughter. Leadership is sometimes done with detachment, using irony, for example, to show acceptance of risk and of general circumstances. As Tom said in a light tone with a smile, in reference to a project, "We are making all the possible mistakes we can in [country X] and fixing them before the big launch in [country Y]." This was understood not as condemnation of the project members but his own defense of the process. By exaggerating the mistakes through humor, he was also saying that there are not that many mistakes, and it is fine.

The second author noticed that the discourse on humor in meetings and in the office often had the leaders opening themselves to critique. In discussing facilities in the new building where Moomin was thinking to move, one of the people present in the meeting asked Roleff the CEO: "And your jacuzzi? Where will that be located?" Amid a roar of laughter, he said with a smile and dry tone that "I am not an enthusiastic bather. I prefer showers." This was perhaps understood in different ways. On the one hand, Rolle was deflecting the suggestion that he needs special treatment. On the other, he indicated that they will be able to enjoy themselves without his presence.

The second author witnessed many times how some people felt comfortable poking fun at Roleff the CEO, and how he kept the joke going. In a monthly meeting held online, one of the media specialists had a filter that gave her bunny ears. She

explained that this was from an application that few older staff had. A senior female employee then spoke out, "Rolle, let's meet in the app. It's a channel for younger people." Most people chuckled. His response was quick and dry, "Maybe later... much later" ...as in, "Never." In terms of leadership, we felt that he acknowledged the age joke but took it further with "much later." This contributed to the relaxed atmosphere that helped to constructively discuss the matters at hand.

In another example, we saw correction through humor, making light of a general weakness that some people may have without accusing anyone in particular. We considered this as another discursive leadership practice. Roleff pointed out in an all-hands meeting, "as someone does something really nice, and then all of sudden in different parts of the organization people start copying it, but not as well [he talked in a light humoristic tone, and this was followed by several background comments or laughter]. So, you get sort of diluted versions of it." This felt like a correcting comment, but with acknowledgement for people's enthusiasm or, perhaps reading too far into it, their laziness, cloaked in humor.

In the interviews, Moomin Characters employees told the second author that it can be difficult sometimes to understand whether a certain story is directed towards them, or if it is simply a funny story. This could be a tool to guide and to steer without the heavy hand of correction or instruction, in a way, leaving it up to the individual to figure it out. At the same time, this could lead to a mild paranoia in which one tries to read too much into what is joked about.

In supporting people

In his ethnographic study, the second author noticed how people who were facing difficulties in life received special support from other organizational members at Moomin Characters, managers and employees alike. This is where the caring ethos that characterizes the functioning of the organization surfaced particularly visibly, reflecting Tove Jansson's stories where the Moomins deal together with hardships and emotions. It was pointed out in one interview with a leader, that "everyone has problems in life, but this office [looks around and laughs] seems to collect people who are a bit extreme. Many have had a tough time." This was reflected upon and then followed up with, "I know that we could have someone

who is more experienced or more capable in one or more positions. But that is not our way. And it is a strength that we don't throw people away if someone better comes along." This momentary chuckle about the tough backgrounds, the speaker included, seemed to be grounded on their priorities and values. Humor was again very much present in how managers and employees responded to each other's struggles, playing out as supportive and caring leadership.

For example, an employee told the second author how she was some time ago diagnosed with cancer and how a shared sense of humor in the workplace helped her through her tribulations. This employee was one of many that the second author met who feels deeply about Moomin, its values, and its people. After the initial shock, the employee decided that she wanted to continue working. "I wanted to work during the treatments so that I had something meaningful to do and think about. And I couldn't be more grateful for my workplace, how they have let me be sick and let me work all that time," she recalled all that she had been through. "Working at Moomin kept me sane!" She told the second author:

> My colleagues here at Moomin bought bracelets that said, 'Fuck cancer!' and gave them to everyone. When I joined them for a video meeting, everyone raised their hands to show it, and I got a photo of them with the text, 'You can do it!' And all the cards I got in each phase... the chemotherapy, the surgeries, and so on. I am just so grateful.

This empathy is not only between employees or from the leaders to the employees. It goes both ways. One employee said, "We want to make the best artist-presenting site with tove.com, and the sky's the limit. No pressure [laughs]. Luckily James is in charge of the visual side [smiles]. I think he has even more pressure seeing as his mother is Sophia and great aunt is Tove [adopting a warm light tone]." This was a release, we felt, sharing with humor the weight of expectations regarding a huge project. At the same time, a lighter tone and warmth is used to point to Sophia's son who is the Artistic Director. It is a shared weight, but more on him than on the interviewee. In this sense, making light of the stress but seeing the project lead in a more nuanced way, we feel the employee is also supporting the leader. This ability to see leaders

in the organization including their weaknesses or just personal characteristics is something a specific discourse on humor can facilitate. Another employee commented on Roleff the CEO:

> One thing that I think is always nice is that Rolle says that we only work with the best, so that everyone in the room [laughs softly] thinks they are the best [laughs harder]. And the work is going so well so... [voice bubbling] you feel like you're one of the chosen ones [splits up laughing for a moment] uh... yeah. I'm the best! [Still laughing] Yeah.

This is an interesting interchange because the interviewee is being both cynical and appreciative. They are self-aware that it feels good to hear that one is among the best, even though they feel it is not totally true. And seeing it applied to anyone who comes near the work as a partner or collaborator does dilute its value. However, it is still appreciated despite the broad application.

Seeing the top decision-makers in their fullness came out regularly in the second author's interviews. For example, "Rolle! [laughs]. That man knows how to make money. He came in and said, 'I'll need the power to make decisions, otherwise, I won't come.' And Sophia made a wise choice and hired him [laughs loudly] and got a husband in the mix [still chuckling] but that was later." The interviewee was discussing the changes in the Moomin organization and business over the years that contributed to its profitable growth. It was a long section of the interview, but this sudden laughter felt like amazement or chagrin. They bluntly shared their view that in becoming CEO Rolle did what he said he would do, which was surprising. The laughter here also felt a bit like a recognition of Sophia as a person like anyone else.

Perhaps we are giving too much meaning to micro-moments of laughter, a sardonic tone of voice, or an embarrassing anecdote, but as part of a specific discourse on humor it was a pattern that repeated itself nearly every day when the second author was doing his study. Small, funny comments, particularly self--ironic on the part of Sophia and Roleff, injected an attitude into the room (and it was one big open office) that made it difficult to keep them at arm's length. This is also a way to undermine any efforts to shift responsibility onto them for one's

work, in a way, as they are as human and fallible as everyone else. We would not suggest it is consciously done, but it does seem to bring everyone up or down to about the same level, as in Tove Jansson's Moominvalley.

In parties

In his ethnographic study, the second author learned that parties are a key fabric of the Moomin Characters organization and the business ecosystem. Parties serve as one means of retaining its sense of common purpose and togetherness. They symbolize how everyone is different, and everyone is accepted as they are. Tove Jansson enjoyed parties and they feature prominently in her Moomin stories. Parties are a fundamentally important part of the Moomin philosophy. In these less formal occasions outside the workplace, humor tends to blossom freely.

There is a discourse around parties at Moomin. During a workshop to define or narrow down the company values, one group of participants was looking at how to make newcomers feel welcome. Someone was saying that there was "a lot of debt" accumulated during the Covid-19 pandemic. The second author asked what that meant, and several spoke over one another, "Party debt," "We haven't met for such a long time," and "We haven't had a chance to party for a long time." Roleff then explained, "For you to understand, we have a very long tradition… to have these crayfish parties, spring and autumn meetings, licensee meetings, where everyone is invited regardless of how long they have been in the company. Or we go once a year maybe to see a Moomin exhibition in London or take the whole company to Japan. It is the glue that holds us together." In the background was a quiet comment from someone, "We like glue!"

In parties, humor blends into the fabric of interaction and runs wild and free. It arises in the way in which most people open themselves to risk, from costumes, karaoke singing that does not need to hit the right notes, to a conscious disregard for status. There is a lot of laughing at Moomin parties for the simple reason that they put work on hold and invest time in each other… and they have been partying together for a long time. There are still hierarchies, but we are not convinced this separation can ultimately be removed since the event is a manifestation of the company that is managed by family members.

In the interviews, Moomin Characters employees told the second author how important parties are in retaining Tove Jansson's spirit. Many times, both when discussing the planning of a party or while being there, people would say to the second author, "Tove loved parties" as though he might have needed something explained. This kind of historical reflection seemed to be an integral part of the story, of leadership, and of the discourse on humor. Parties also had a more hands-on reason and practical meaning. An employee told the second author that "We need parties! [laughs] You can fix problems much faster, in the months after a big party because you know people better."

On the edge

At Moomin Characters, the second author noticed in his study that humor acts as a safety valve when pressure mounts and people get tense. Humor is important because tensions and conflicts are a natural part of any community, and people need to be able to let off steam from time to time. However, the second author observed that there is a sense of harshness at times in Moomin humor. Wild and witty humor can turn prickly. It can be interpreted in different ways, and sometimes it can lead to misunderstandings. Humor can thus contribute to friction and tensions in the organization, and it can render leadership subject to vagaries that create uncertainty. For example, an employee confided in the second author, telling him that "There are no secrets here. If you want something to be a secret [tight laugh] you don't talk about it at work. There are no doors – actual doors. The conference rooms are open at the top [giggling]. It is transparency, for sure [laughs]. If you want to know what's secret, just sit at your desk without headphones." It seems that part of the humor here was that the employee shared a secret about "no secrets" with the second author.

Perhaps all the laughter arises from the tension between wanting transparency and feeling uncomfortable with so much transparency. This often came up in the second author's informal conversations with managers and employees, and it would be difficult to assign its meaning without understanding the greater context, the individuals' histories, and their own ambitions. "Over-sharing" was referred to with rolled eyes and a shrug, followed by a conspiratorial,

"Let's listen a bit more" look and smile. An employee said to the second author, a little jokingly, as if revealing a dark side of an otherwise constructive and respectful organization:

> Sometimes there is a way of speaking about others that is maybe not so nice. A tendency to speak about people behind their backs. It can be said as a joke, but it makes some people insecure, or feel that they are falling out of favor. And some of the confusion comes from decisions made behind the curtain [nervous laugh] by the family at home, and then a decision comes to the office, but we don't know what's behind it [chuckling]. I think it's normal in family businesses.

Here we understand that the situation is devoid of humor and can be quite stressful. However, in the telling, there is an attempt to poke at some of the leaders' behaviors, if only to regain some control over or detachment from certain interactions. Another employee said that "There is a husband-wife and sons family tension sometimes and it's something we joke about [...] These are little issues, so not worth bringing up elsewhere. Don't get me wrong. It's rare. Maybe that's why I think of it now." We think that these kinds of reflections allow employees as well as managers to distance themselves from family-related tensions and create a bond or comradery in the office, to do leadership apart from or in addition to the family. The second author was also told multiple times by different people how new organizational members at Moomin go through a baptism of fire when they engage with humor that is at times quintessentially harsh. In his ethnographic study, the second author saw how this works out in practice. He noticed how some newcomers come on board relatively quickly, while for others Moomin humor is noticeably absent from some contexts.

Further, as someone said, "Even if we are very busy, there's still time for a joke. In [another company in the Moomin ecosystem], they are so busy and serious, so when I'm there and joke around, they look at me like, 'Don't you have something to do?' Where I am sitting, we are just less stressed [chuckling]." There were a lot of indications that different parts of the organization seem to have their own versions of the discourse on humor. The second author learned that humor does

not necessarily carry over from the Moomin Characters core to other companies, or from one department or section to another without contextualization.

Rebels are part of the fabric of Tove Jansson's Moomin stories. The second author realized that by invoking the separation between the importance of the work and the ironic nature of the self, top decision-makers are accepting and inviting people to be and do what they would like. If someone would come in and take themselves too seriously, or take the legacy of Tove Jansson too lightly, we imagine they would not last long. There are exceptions, but the leadership of Moomin Characters seem to be allergic to self-importance. A dear friend of Roleff's told the second author with a big smile on their face, standing next to the butt of the joke, "Oh you'll never hear the end of how humble he is." And everyone laughed.

Concluding remarks

In this paper, we have contributed to understanding leadership as discursive practice steered by humor. We set out to explore how leadership, viewed as practices constructed in interactions (Crevani et al., 2010; Fairhurst & Uhl-Bien, 2012), is done in and through humor. In our study in the Moomin business we witnessed how a specific discourse on humor steered leadership. It conditioned organizational interactions that are relational as they move responsibility and accountability around through a layered dialogue. Humor facilitated admonishment but also recognition, wherein neither was totally clear. This lack of clarity opened possibilities for others to contribute and bring their best to work without the restrictive micro-management seen in many companies. By making themselves the focus of jokes and humorous banter, top decision-makers or leaders gave organizational members an opportunity to let off steam rather than build up to a major conflict. However, that same lack of clarity could inculcate mild paranoia in those who wanted to know where they stood with the leaders.

As such, our study shows how leadership and humor reflect a more fundamental view on professional life. We found that at Moomin, it is alright to joke about oneself and with others, and even about the inanity of some of the work done. However, the corporate values of love, equality, and courage never came under

attack. Everything else could be the source of an amusing story, a critical jab, or rolling eyes, but not Tove Jansson's legacy. The crucial but hardly surprising point is that jokes and comments are contextual in that they only become understandable when one is able to place oneself and the speaker in proper relation. These relations are embedded in practices that are discursive: there are established and taken-for-granted ways of speaking and referring to things related to a worldview that structures interactions. This is both enabling and restricting, as it offers each the freedom to be themselves, but comes with certain obligations to accept others. At Moomin, a particular discourse on humor helpes organizational members to enact leadership that is caring and respectful of differences and, through repetition and recognition of the others, to institutionalize it (cf., Crevani et al., 2010).

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Michał Szostak

Institute for Management Research

Collegium Civitas, Poland

michal.szostak@civitas.edu.pl

ORCID ID: 0000-0002-7774-2964

Phenomenological Perspectives in Dialectical Leadership: Influence of Aesthetic Experiences on Managing Organisational Complexity and Paradoxes

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Abstract: Through a critical literature review, the study analyses the influence of leaders' sensory and emotional experiences on shaping their capacity to navigate contradictions and tensions inherent in complex organisational environments. By engaging with concepts of embodied perception, multisensory engagement, and aesthetic judgment, the article highlights how these factors contribute to leaders' decision-making processes and their ability to foster creative resolutions in paradoxical situations, offering a phenomenological perspective that emphasises the importance of leaders' subjective experiences in managing organisational complexity. The article answers the following research questions: 1) How do subjective aesthetic experiences (including sensory perceptions and emotional responses) influence leaders' decision-making processes and ability to manage organisational paradoxes and complexity? 2) How do embodied perception, multisensory engagement, and aesthetic judgments enhance the efficiency of dialectical leadership in resolving tensions and fostering creativity within organisations? The article concludes by underlining its limitations and proposing future research directions.

Keywords: discursive leadership, management aesthetics, management art, humanistic management, phenomenology

Introduction

In an era marked by rapid change and increasing complexity, leaders are challenged to navigate the multifaceted dynamics of contemporary organisations. Traditional leadership models (rooted in rational and strategic decision-making)

have been critiqued for their limitations in addressing the paradoxes and contradictions inherent in organisational life (Bass & Avolio, 1994; Gosling & Mintzberg, 2004). As organisations become more interconnected and dynamic, there is a growing recognition of the need for leadership approaches that go beyond the cognitive and rational dimensions, incorporating the aesthetic, emotional, and sensory aspects of human experience (Strati, 1999; Szostak, 2024).

This article explores integrating aesthetic experiences (comprising sensory perceptions and emotional responses) into the practice of dialectical leadership. Dialectical leadership, characterised by its ability to hold and reconcile opposing forces, offers a robust framework for understanding how leaders can effectively manage organisational tensions and paradoxes. The concept of aesthetics in this context is not limited to visual or artistic elements but extends to a phenomenological understanding (Ingarden, 1981; Merleau-Ponty, 2005) of how leaders perceive, interpret, and respond to the complexities of their organisational environment (Grint, 2001). This article situates the discussion within the broader discourse of relational and transformational leadership, emphasising the importance of relational processes and multi-level interactions in efficient leadership. Integrating aesthetic sensitivity into leadership practice is argued to enhance leaders' ability to engage with the beyond-rational aspects of organisational life, fostering a more profound understanding (aestheticisation) of the emotional and symbolic dimensions that influence decision-making (Putnam et al., 2016; Szostak, 2024).

These considerations are related to the theory of the aesthetic situation (Gołaszewska, 1984) in the context of a metaphoric approach that a leader (manager) is an artist who (dealing with employees and other stakeholders) within and by an organisation (considered as an artwork) influences the environment (Szostak & Sułkowski, 2020). In this context, a leader not only manages a tangible organisation and particular processes within it but also manages an intangible aesthetic situation (Szostak, 2023).

The methodology applied in this article is based on a qualitative literature review of crucial monographs in the research area and scientific articles from the following databases: EBSCO, Google Scholar, JSTOR, Mendeley, Scopus, and Web of Science. The applied interdisciplinary and multi-paradigm research

approach is based on the intersection of humanistic management, management aesthetics, and psychology. The following research questions were set to organise the considerations logically:

1) How do subjective aesthetic experiences (including sensory perceptions and emotional responses) influence leaders' decision-making processes and ability to manage organisational paradoxes and complexity?
2) How do embodied perception, multisensory engagement, and aesthetic judgments enhance the effectiveness of dialectical leadership in resolving tensions and fostering creativity within organisations?

By addressing how aesthetic experiences influence leaders' decision-making processes and capacity to manage organisational paradoxes, this article contributes to the evolving discourse on leadership, offering insights into how leaders can navigate the complexities of modern organisations while fostering creativity and innovation.

Theoretical framework

Phenomenology and aesthetics in leadership

As a philosophical approach, phenomenology focuses on studying lived experiences and the meanings these experiences hold for individuals (Heidegger, 1962; Merleau-Ponty, 2005). This approach emphasises the importance of subjective perception and the embodiment of experience, thus offering a unique lens through which leadership can be examined. In the context of leadership, phenomenology provides a framework for understanding how leaders perceive, interpret, and respond to the complex and dynamic environments in which they operate (Ashworth, 2003). Incorporating aesthetic considerations into phenomenological leadership studies further enriches this perspective by acknowledging that leadership is not merely a cognitive or strategic endeavour,

but also one deeply rooted in sensory and emotional experiences (Ladkin, 2008).

The concept of aesthetics in leadership encompasses more than just visual or artistic aspects; it refers to a broader understanding of how sensory experiences, emotions, and the embodiment of leadership influence leaders and their followers. Aesthetic leadership involves recognising the significance of leadership's sensory and emotional dimensions, which can shape leaders' actions, decisions, and overall organisational climate (Hansen et al., 2007). This perspective challenges the traditional, rationalist views of leadership that often prioritise logical reasoning and objective decision-making by highlighting the role of affective and embodied knowledge in effective leadership practices (Ladkin & Taylor, 2010).

Phenomenology's emphasis on lived experience and embodiment aligns closely with the aesthetic dimension of leadership. In phenomenological terms, leadership can be seen as a practice deeply embedded in the lived experiences of both leaders and followers, with aesthetic experiences shaping how leadership is perceived and enacted (Ladkin, 2010). This approach suggests that leadership is not merely a set of behaviours or traits but is also a phenomenon that is felt and experienced through the senses. The way a leader's voice resonates in a room, the physical presence they command, or the aesthetic qualities of the environments they create, all contribute to the experience of leadership (Hansen et al., 2007).

Aesthetic experiences in leadership can be understood through the sensory perception and appreciation of qualities such as harmony, beauty, and rhythm (Ladkin, 2008). Leaders attuned to the aesthetic dimensions of their environment and interactions are better equipped to create conditions that foster creativity, innovation, and engagement within their teams (Taylor & Ladkin, 2009). The design of workspaces, the pacing of meetings, or the symbolic use of language can all be aesthetic tools that influence organisational dynamics (Hansen et al., 2007).

Phenomenology and aesthetics offer insights into leadership's relational aspects. From this perspective, leadership is seen as an intersubjective phenomenon, where the leader's presence and actions are co-constructed

through interactions with others (Ropo & Parviainen, 2001). The aesthetic qualities of these interactions (tone, gesture, and spatial dynamics) are crucial in shaping the relational field within which leadership occurs. This understanding moves beyond the leader-follower dichotomy, suggesting that leadership emerges from the shared aesthetic experiences of those involved in the organisational context (Ladkin, 2010).

Integrating phenomenology and aesthetics into leadership studies emphasises the role of embodied knowledge. This concept refers to the tacit, non-verbal knowledge embedded in bodily practices and sensory experiences (Merleau-Ponty, 2005). For leaders, efficient leadership is not solely a cognitive activity but also involves reading and responding to the aesthetic cues in the organisational environment (Ropo et al., 2013). A leader's ability to sense a team's mood, anticipate their followers' unspoken concerns or use space and movement efficiently draws on embodied knowledge (Hansen et al., 2007). Such capabilities are often developed through practice and reflection, and they highlight the importance of aesthetic sensibility in leadership.

Dialectical leadership: concepts and challenges

Dialectical leadership is an approach that embraces complexity, contradiction, and change as inherent features of organisational life. Rooted in dialectical thinking, this leadership style is grounded in the philosophical tradition of dialectics, emphasising the dynamic interplay of opposing forces and the synthesis that emerges from their interaction (Benson, 1977; Putnam et al., 2016). In a leadership context, this approach involves recognising and managing the tensions, paradoxes, and dualities that naturally arise within organisations to foster innovation, adaptability, and long-term success (Smith & Lewis, 2011).

At its core, dialectical leadership is predicated on the idea that organisational realities are characterised by ongoing contradictions – such as stability versus change, control versus autonomy, and individuality versus collectivity (Putnam et al., 2016). Rather than attempting to resolve these tensions by privileging one side over the other, dialectical leaders seek to

engage with and leverage these oppositions to generate creative solutions. This approach contrasts with traditional leadership models that often focus on resolving or minimising conflicts, instead recognising that the coexistence of opposing forces can be a source of strength and innovation (Clegg et al., 2002).

One of the primary challenges of dialectical leadership lies in the leader's ability to balance opposing forces without collapsing into either-or thinking. This requires a sophisticated level of cognitive and emotional complexity, enabling leaders to navigate paradoxes in ways that are integrative rather than reductive (Lewis & Smith, 2014). Leaders must be comfortable with ambiguity and uncertainty and be able to tolerate the discomfort that arises from holding conflicting ideas simultaneously. This capability, often referred to as 'paradoxical thinking,' is essential for dialectical leaders as they work to synthesise diverse perspectives and guide their organisations through complex, dynamic environments (Smith & Tushman, 2005).

Moreover, dialectical leadership demands high reflexivity, where leaders continuously reflect on their assumptions, biases, and actions. This reflexivity is critical for recognising when personal or organisational tendencies might lean too heavily towards one pole of a paradox, thus potentially stifling the generative potential of the opposing force (Fairhurst & Putnam, 2019). By fostering an awareness of these dynamics, dialectical leaders can create organisational cultures that are more resilient, adaptive, and innovative.

Another significant challenge for dialectical leaders is the communication of paradoxes within the organisation. Effective dialectical leadership requires transparent and open communication practices that allow for expressing diverse viewpoints and exploring contradictions (Putnam et al., 2016). Leaders must be skilled in framing and reframing issues to highlight the value of opposing perspectives, thus encouraging dialogue and collaboration among team members. This communication process is crucial for building a shared understanding of the paradoxes at play and for enabling collective sense-making (Fairhurst, 2001).

In addition, the practice of dialectical leadership is often complicated by organisational structures and cultures that may resist the acceptance of paradoxes. Many organisations are built on hierarchical models that favour

transparent, linear decision-making processes and may struggle to accommodate the fluid, dynamic thinking required for dialectical leadership (Smith & Lewis, 2011). To overcome this, dialectical leaders must cultivate a culture of openness and flexibility, where employees feel empowered to engage with complexity and are encouraged to view contradictions as opportunities rather than problems (Cunha & Putnam, 2019).

Integrating phenomenology with dialectical leadership

Integrating phenomenology with dialectical leadership offers a compelling framework for understanding how leaders navigate complex, contradictory environments while remaining attuned to their lived experiences and those of others. This integration emphasises the importance of embodied perception, sensory engagement, and the subjective interpretation of organisational dynamics, providing a holistic approach to leadership that acknowledges both the cognitive and affective dimensions of leadership practice (Ladkin, 2008; Merleau-Ponty, 2005).

As a philosophical method, phenomenology is concerned with studying phenomena as they are experienced from a first-person perspective. It prioritises individuals' subjective, lived experiences and considers how these experiences shape understanding and action (Heidegger, 1962; Zahavi, 2019). When applied to leadership, phenomenology suggests that leaders' decisions and behaviours are not merely the result of rational analysis but are also deeply influenced by their embodied and emotional experiences (Ladkin, 2010). This perspective aligns closely with dialectical leadership principles, which recognise the inherent contradictions and tensions within organisational life and view them as opportunities for growth and innovation (Smith & Lewis, 2011).

The integration of phenomenology with dialectical leadership begins with the recognition that leaders operate within a field of constantly shifting and often contradictory experiences. Phenomenological awareness allows leaders to perceive and engage with these contradictions in a manner that is both reflective and responsive to the lived experiences of those within the organisation (Ashworth, 2003). This means that leaders must be attuned to the sensory and

emotional cues that emerge in the workplace, understanding how these elements influence their own perceptions and actions and those of their team members (Hansen et al., 2007).

Dialectical leadership, focusing on managing paradoxes, benefits significantly from a phenomenological approach. Phenomenologically aware leaders are better equipped to navigate the dualities inherent in organisational life, such as the tension between stability and change, or control and autonomy. By being attuned to their team members' embodied experiences and emotional states, leaders can more effectively manage these tensions in ways that foster innovation and adaptability (Putnam et al., 2016). For instance, a leader may recognise that a team's resistance to change is not merely a cognitive objection but is rooted in more profound emotional and sensory experiences of uncertainty or discomfort. Addressing these underlying experiences can help craft more nuanced and effective responses to organisational challenges.

Moreover, integrating phenomenology with dialectical leadership highlights the importance of embodied cognition in leadership practice. Embodied cognition suggests that our understanding and decision-making are grounded in bodily experiences and world interactions (Varela et al., 1991). In dialectical leadership, leaders must be aware of how their physical presence, gestures, and movements influence the organisational environment and the perceptions of those around them (Ladkin & Taylor, 2010). This embodied awareness enables leaders to manage paradoxes more effectively by aligning their actions with their team members' sensory and emotional realities, thereby fostering a more cohesive and adaptive organisational culture.

Additionally, phenomenology's emphasis on intentionality—the idea that consciousness is always directed towards something—offers valuable insights for dialectical leadership. Leaders who adopt a phenomenological stance are more likely to engage with organisational contradictions intentionally, approaching them not as problems to be solved but as dynamic tensions to be navigated (Heidegger, 1962). This intentionality aligns with the dialectical approach, which views contradictions as a source of creative potential and organisational growth (Clegg et al., 2002).

Subjective aesthetic experiences in leadership

Subjective Aesthetic Experiences in Leadership will be analysed in the following steps: 1) sensory perceptions and emotional responses, 2) phenomenological values in decision-making, and 3) managing paradoxes and complexity.

Sensory perceptions and emotional responses

Sensory perceptions and emotional responses are crucial in leadership, particularly within phenomenological and dialectical approaches, because these elements are central to understanding how leaders and their followers experience, interpret and respond to the complexities of organisational life. Sensory perceptions refer to how leaders and employees engage with their environment through the senses, while emotional responses involve the affective reactions elicited by these sensory experiences (Hansen et al., 2007). Together, these components shape the subjective experience of leadership and influence decision-making, communication, and organisational interpersonal relations.

Phenomenology, with its focus on lived experience, provides a valuable lens for examining the role of sensory perceptions in leadership. Perception is not a passive reception of sensory stimuli but an active, embodied process through which individuals make sense of the world (Merleau-Ponty, 2005), which means that objective reality and previous experiences, emotions, and bodily states shape leaders' perceptions. Sensory perceptions can influence how leaders interpret situations, identify problems, and generate solutions (Bitner, 1992).

Emotional responses are closely intertwined with sensory perceptions, as emotions often arise from sensory experiences. According to the affective events theory, workplace events trigger emotional responses that, in turn, influence organisational attitudes and behaviours (Weiss & Cropanzano, 1996). Leaders' ability to recognise and manage their and followers' emotions is critical for effective leadership. This is particularly crucial in dialectical leadership, where leaders must navigate and integrate conflicting perspectives and emotions. Emotional intelligence, which encompasses perceiving, understanding, and regulating emotions, is a key competency for dialectical leaders (Goleman, 1995).

Sensory and emotional experiences are not merely individual phenomena but are socially and culturally mediated. Cultural norms, organisational values, and social interactions influence how leaders and employees perceive and respond to their environment (Küpers, 2013). The emotional tone of a meeting can be shaped by the sensory atmosphere, such as lighting or seating arrangements, which in turn affects the mood and engagement of participants. Integrating sensory perceptions and emotional responses into leadership practice also has implications for the aesthetic dimension of leadership: the role of beauty, harmony, and sensory appeal in shaping organisational life (Hansen et al., 2007). Leaders who understand the impact of sensory and emotional experiences can use aesthetic elements to create inspiring and motivating environments that align with the principles of phenomenology (Ladkin, 2008).

The interplay between sensory perceptions and emotional responses is central to managing organisational paradoxes and contradictions. Dialectical leadership requires a sensitivity to the emotional undercurrents that accompany organisational tensions, such as the fear of change or the uncertainty discomfort. By recognising and addressing these emotions, leaders can help their teams navigate paradoxes in a way that fosters resilience and creativity (Smith & Lewis, 2011). In this context, sensory awareness enhances a leader's ability to detect and respond to the subtle emotional signals often accompanying paradoxical situations.

Phenomenological values in decision-making

Phenomenological values in decision-making emphasise lived experience, subjective interpretation, and embodied understanding as central to the decision-making process. Within leadership, these values highlight the importance of considering the full spectrum of human experience (including emotions, perceptions, and intuitions) when making decisions that affect organisational life. This approach contrasts with traditional, rational models of decision-making that often prioritise logic, objectivity, and quantitative data over qualitative and experiential knowledge (Sandberg & Tsoukas, 2011).

Phenomenology offers a framework for understanding how decisions are shaped by the context in which they are made, the experiences of the decision-makers, and the meanings that individuals ascribe to those experiences (Heidegger, 1962; Husserl, 1970). In leadership, applying phenomenological values involves recognising that decision-making is not a detached, purely cognitive activity but is deeply intertwined with the leader's embodied presence, emotions, and the social and cultural context in which the decision occurs (Küpers, 2005).

One of the critical aspects of phenomenological decision-making is the role of intuition and tacit knowledge. Tacit knowledge is the unarticulated, experiential knowledge individuals accumulate through their experiences (Polanyi, 1966). This knowledge often informs intuitive decision-making, where leaders rely on their gut feelings or instincts rather than formal analysis. From a phenomenological perspective, intuition is not seen as irrational but as a legitimate form of knowing that emerges from the leader's deep engagement with their environment (Sadler-Smith, 2008).

Also, emotions play a critical role in phenomenological decision-making. Emotions are not merely reactions to external events but are integral to how individuals perceive and make sense of the world (Damasio, 1994). Leaders attuned to their own emotions and those of others can better navigate the complexities of organisational life. Emotional awareness allows leaders to understand the impact of their decisions on the well-being and motivation of their employees, fostering a more empathetic and responsive leadership style (Goleman et al., 2002). This is particularly relevant when decisions involve moral or ethical considerations, as emotions often provide critical insights into the values and principles that should guide action (Ladkin, 2008).

Phenomenological values encourage a more holistic approach to decision-making, where the focus is not only on the outcome but also on the process by which decisions are made. This includes paying attention to the interpersonal dynamics, power relations, and communicative practices that influence organisational decision-making (Van Manen, 2016). Leaders who adopt a phenomenological approach likely involve others in decision-making, valuing diverse perspectives and fostering shared understanding and

ownership. This collaborative approach aligns with the principles of dialogical leadership, which emphasises open dialogue, mutual respect, and the co--construction of meaning (Cunliffe & Eriksen, 2011).

Phenomenological decision-making recognises the importance of specific historical, cultural, and organisational contexts, which shape the options available and the potential consequences of those decisions (Heidegger, 1962). Leaders sensitive to context understand that there are no universally applicable solutions and that effective decision-making requires a nuanced understanding of the specific circumstances. This contextual awareness allows leaders to adapt their decisions to their organisations' unique needs and challenges, promoting more effective and sustainable outcomes (Sandberg & Tsoukas, 2011).

Managing paradoxes and complexity

Managing paradoxes and complexity is a central challenge for contemporary leadership, particularly in an organisational landscape characterised by rapid change, ambiguity, and conflicting demands. Paradoxes (situations where opposing yet interdependent elements coexist) are increasingly recognised as inherent to organisational life (Smith & Lewis, 2011). On the other hand, complexity refers to the intricate and dynamic nature of organisational systems, where numerous interconnected variables interact unpredictably (Snowden & Boone, 2007).

The concept of paradox in organisations has been extensively explored, highlighting the importance of embracing, rather than avoiding, contradictory demands. Paradoxes often manifest in tensions such as stability versus change, individual versus collective interests, and exploration versus exploitation (Lewis, 2000). Rather than viewing these tensions as problems to be solved, dialectical leadership approaches them as opportunities for growth and innovation (Putnam et al., 2016). This approach aligns with dialectical thinking principles, emphasising the synthesis of opposites to generate new insights and solutions (Smith & Lewis, 2011). One effective strategy for managing paradoxes

is adopting paradoxical thinking, which involves recognising and accepting the existence of contradictory forces within organisations. Paradoxical thinking enables leaders to transcend the binary "either/or" logic and adopt the "both/and" perspective (Clegg et al., 2002). This cognitive flexibility allows leaders to see the value in opposing viewpoints and to integrate them in ways that foster organisational adaptability and innovation (balancing the need for short-term results with long-term strategic goals). By adopting a paradoxical approach, the leader can encourage a culture that values immediate performance and future sustainability, enhancing the organisation's overall resilience.

Emotional resilience is another crucial aspect of managing paradoxes and complexity. Leaders must not only navigate the cognitive challenges posed by paradoxes but also manage the emotional discomfort that often accompanies them. Paradoxical situations can evoke anxiety, frustration, and uncertainty as they challenge individuals' need for consistency and closure (Vince & Broussine, 1996). Emotionally resilient leaders are better equipped to tolerate these tensions and guide their teams through periods of ambiguity and change. Emotional intelligence, which includes recognising, understanding, and managing emotions, plays a vital role in this process (Goleman, 1995).

In addition to managing paradoxes, leaders must also navigate the complexities inherent in organisational systems. Complexity theory has gained prominence in organisational studies and provides valuable insights into how leaders can manage dynamic and interdependent systems (Uhl-Bien & Marion, 2009). According to complexity theory, organisations are complex adaptive systems composed of multiple interacting agents whose behaviours are interdependent and non-linear (Anderson, 1999). It means that small changes in one part of the system can have significant and unpredictable effects on the organisation as a whole. That is why a holistic approach to decision-making, considering the broader system dynamics and the potential unintended consequences of their actions, is a desired feature of a conscious leader. Complexity theory suggests that leaders should foster conditions that enable adaptability and emergent solutions rather than attempting to control outcomes directly (Snowden & Boone, 2007). This involves encouraging experimentation, promoting diversity of thought, and facilitating open

communication and collaboration within the organisation. By doing so, leaders may create a culture of continuous learning and innovation that is better equipped to respond to the uncertainties and challenges of a complex environment (Uhl-Bien & Marion, 2009).

Embodied perception and multisensory engagement

The following issues will describe embodied perception and multisensory engagement: 1) understanding embodied perception, 2) the role of multisensory engagement in leadership, and 3) enhancing dialectical leadership through embodied aesthetics.

Understanding embodied perception

Embodied perception, a core concept in phenomenological philosophy, asserts that perception is not merely a cognitive process but is fundamentally rooted in the body's interaction with the world. This perspective challenges traditional Cartesian dualism, which separates the mind from the body, and instead posits that the body plays a critical role in shaping our experiences and understanding of reality (Merleau-Ponty, 2005). In the context of leadership, embodied perception highlights how leaders' physical presence, movements, and sensory experiences influence their decision-making, communication, and interactions within organisational settings.

Perception can be considered an embodied process wherein the body is the primary site of knowing the world; the body is not just a passive recipient of sensory stimuli but an active participant in the perception process. This means that our understanding of the world is always situated, contingent upon our bodily engagement with our surroundings (Merleau-Ponty, 2005). For leaders, this implies that their perceptions and subsequent actions are influenced by their physical positioning, gestures, and sensory engagement with the organisational

environment: the spatial arrangement of a meeting room, the temperature, or even the leader's posture can significantly affect the dynamics of communication and decision-making processes (Strati, 1999).

Embodied perception also underscores the importance of non-verbal communication in leadership. Non-verbal cues, such as body language, facial expressions, and eye contact, are crucial to how leaders convey meaning and influence others (Küpers, 2013). These cues are not merely supplementary to verbal communication but are integral to how followers perceive and understand messages. For instance, a leader's confident posture can instil trust and authority, while a warm smile can foster a sense of approachability and openness. The embodied nature of these interactions suggests that leadership is as much about physical presence and movement as it is about verbal articulation and intellectual reasoning.

In addition, embodied perception challenges the notion of objectivity in leadership. Traditional views often emphasise the importance of objective analysis and detached reasoning in decision-making. However, from an embodied perspective, all perception is inherently subjective, shaped by the leader's bodily experiences, emotions, and prior encounters (Lakoff & Johnson, 1999). This suggests that leaders cannot fully detach themselves from their embodied experiences when making decisions. Instead, they must acknowledge and reflect on how their perceptions are influenced by their physical states and the environments in which they operate. Such self-awareness can enhance leaders' ability to understand and empathise with the perspectives of others, leading to more nuanced and effective leadership practices.

The embodied nature of perception also has implications for how leaders engage with complexity and ambiguity in organisational settings. Complexity often arises from the interrelations between various organisational elements, which can be difficult to grasp through abstract, cognitive reasoning alone. An embodied approach to perception enables leaders to engage more holistically with these complexities by grounding their understanding in concrete, sensory experiences (Dreyfus, 1996; Merleau-Ponty, 2005). For example, a leader walking through the workspace may gain insights into organisational culture and employee morale that are not apparent through reports or data alone. This

direct, embodied engagement with the environment allows leaders to perceive subtle dynamics and tensions that may go unnoticed.

Moreover, embodied perception is critical in developing practical wisdom (Aristotle, 2014). Practical wisdom (Aristotle's phronesis) involves the ability to make sound judgments and take appropriate action in specific situations, and it is cultivated through experience and embodied engagement with the world. Leaders who cultivate an awareness of their embodied perceptions can develop a deeper understanding of the nuances of their organisational contexts, enabling them to make more informed and context-sensitive decisions.

The role of multisensory engagement in leadership

Multisensory engagement in leadership refers to integrating various sensory modalities (sight, sound, touch, smell, and taste) into the leadership experience. This approach underscores the idea that leadership is not solely a cognitive or verbal activity but involves the full spectrum of sensory experiences. By recognising and utilising multisensory engagement, leaders can enhance their ability to connect with others, make more informed decisions, and create environments that foster creativity, collaboration, and well-being (Schroeder, 2002).

The multisensory engagement concept is grounded in the understanding that humans perceive and interact with the world through a combination of sensory inputs. Each sense contributes uniquely to how we interpret our surroundings and make decisions. In leadership, this means that the sensory environment (the visual aesthetics of a workspace, the ambient sounds, the texture of materials, and even scents) can significantly influence individuals' behaviour, emotions, and organisational performance (Liu et al., 2018). Leaders attuned to these sensory dimensions can create more effective and engaging organisational climates.

Visual perception, for example, plays a crucial role in shaping organisational culture and influencing employee behaviour. The physical design of a workspace, including its layout, lighting, and colour schemes, can affect everything from productivity to morale (Bitner, 1992). A well-designed workspace incorporating natural light, ergonomic furniture, and aesthetically pleasing elements can

enhance focus, reduce stress, and foster a sense of employee pride and belonging. Leaders who prioritise visual aesthetics in their organisational environments demonstrate an understanding of how the physical space can support or hinder organisational goals.

Auditory elements also significantly impact the workplace experience. Soundscapes, which include both deliberate sounds (such as music or announcements) and ambient noise (such as chatter or machinery), can influence mood, concentration, and communication (Blesser & Salter, 2007). Background music in retail settings has been shown to affect customer behaviour and sales outcomes, with certain types of music creating a more inviting and pleasant atmosphere (Hargreaves, 2012). Similarly, in an office environment, the control of noise levels can enhance or detract from productivity and employee satisfaction. Leaders who manage auditory environments effectively can create spaces that promote focus, collaboration, and a positive organisational culture.

Touch, or haptic perception, is another sensory modality that can be leveraged in leadership. The physical interaction with objects and materials (furniture texture, chair comfort, the firmness of a handshake) can convey messages of quality, care, and attention to detail (Peck & Childers, 2003). In leadership, haptic elements are often subtle but powerful communicators of a leader's values and intentions. For example, the choice of materials in an office (luxurious or utilitarian) can signal the organisation's culture and priorities. Physical gestures, such as a reassuring pat on the back or a firm handshake, can reinforce verbal communication and strengthen interpersonal connections.

Olfactory and gustatory perceptions, though less commonly discussed in the context of leadership, also play essential roles in shaping experiences and memories (Piqueras-Fiszman & Spence, 2016). Scents are directly connected to the brain's limbic system, which is responsible for emotion and memory; this connection means smells can evoke strong emotional responses and create lasting impressions. Leaders being mindful of the olfactory environment (ensuring that meeting rooms are free of unpleasant odours or using scents that promote relaxation) can subtly influence the emotional climate of the workplace (Herz, 2016). Similarly, taste can be a factor in leadership during social or celebratory events where food is served, reinforcing communal bonds and shared experiences.

The role of multisensory engagement in leadership extends to the creation of inclusive and innovative organisational cultures. By considering diverse employees' sensory preferences, leaders can design environments accommodating different performing styles: some individuals may be more sensitive to noise or light, and creating flexible spaces that allow for personalised sensory experiences can enhance overall well-being and productivity (Cooper et al., 2009). Multisensory engagement can stimulate creativity by exposing individuals to sensory inputs that trigger new ideas and perspectives (Malnar & Vodvarka, 2004).

Enhancing dialectical leadership through embodied aesthetics

Embodied aesthetics refers to recognising that aesthetic experiences related to beauty, form, and sensory perception are not merely external or superficial but deeply embedded in the leader's physical presence and interactions (Strati, 1999). This concept underscores the idea that leadership is as much an art as a science, involving cognitive decision-making and an embodied, aesthetic engagement with the world (Szostak, 2023).

Dialectical leadership, which involves managing opposing forces and integrating contradictions to achieve a higher synthesis, can be significantly enhanced by embracing embodied aesthetics. This approach allows leaders to harness the power of sensory experiences and aesthetic sensibilities to navigate tensions and complexities more efficiently. The dialectical process, which thrives on the tension between opposites, benefits from the leader's ability to perceive and respond holistically (Putnam et al., 2016).

One way in which embodied aesthetics enhances dialectical leadership is by fostering a deeper connection between leaders and their organisational environment. A leader attuned to the aesthetic dimensions of their surroundings can better understand and influence their employees' emotional and cognitive states (Cunliffe, 2009). Embodied aesthetics enables leaders to engage more authentically with the paradoxes they encounter. Authentic leadership, grounded in self-awareness and consistency between values and actions, is

deeply connected to the leader's embodied experience (Ladkin, 2008). When leaders are physically present and attuned to their embodied responses, they are more likely to act in ways congruent with their values, thus enhancing their ability to navigate conflicting demands with integrity. This authenticity is essential in dialectical leadership, where resolving contradictions requires leaders to be transparent, genuine, and emotionally resonant with their teams.

Practising embodied aesthetics in leadership can foster a culture of innovation and adaptability. Dialectical leadership relies on synthesising diverse perspectives and creating new solutions from conflicting ideas. By engaging with aesthetic experiences, leaders can cultivate a mindset that is open to ambiguity and creative exploration; exposure to art that challenges conventional thinking or participation in activities that engage multiple senses can stimulate leaders' capacity for lateral thinking, making them more adept at resolving paradoxes innovatively (Koivunen & Wennes, 2011).

The role of embodied aesthetics in dialectical leadership also extends to communication and relational dynamics. Leadership is inherently relational, and interaction's sensory and aesthetic dimensions often influence the quality of relationships within an organisation. Leaders who are mindful of their body language, tone of voice, and the physical context of their interactions can create more efficient connections with their followers (Ladkin & Taylor, 2010). These embodied forms of communication are essential in dialectical leadership, where the ability to negotiate and reconcile opposing views depends on the leader's capacity to engage others in a dialogue that is both intellectually and emotionally resonant.

Aesthetic judgement and creativity in leadership

Aesthetic judgement and creativity in leadership will be analysed by focusing on the following issues: 1) defining aesthetic judgement in organisational contexts, 2) fostering creativity and innovation through aesthetic sensitivity, and 3) addressing organisational contradictions with aesthetic judgement.

Defining aesthetic judgement in organisational contexts

Aesthetic judgement, traditionally associated with evaluating art and beauty, has become increasingly relevant in organisational contexts (Minahan, 2020; Strati, 2009; Taylor, 2023). This concept refers to the ability to perceive, interpret, and make decisions based on the sensory and affective qualities of experiences, objects, and environments. In organisations, aesthetic judgement extends beyond visual appeal to encompass a holistic understanding of how sensory experiences influence an individual's behaviour, organisational culture, and overall efficiency (Strati, 1999). As organisations strive to create environments that foster creativity, engagement, and well-being, aesthetic judgement becomes central to leadership and decision-making processes.

Unlike purely rational decision-making, which relies on logic and analysis, aesthetic judgement (inherently subjective and shaped by individual preferences, cultural norms, and contextual factors) requires leaders to consider their choices' emotional and experiential impact (Gagliardi, 2006). However, it also draws on a shared understanding of what is considered harmonious, appropriate, or beautiful within a particular organisational setting.

The application of aesthetic judgement in organisations is multifaceted. One prominent area is the design and management of physical spaces. The aesthetic quality of a workspace (layout, lighting, colour schemes, and materials) can significantly influence employee productivity, satisfaction, and well-being (Elsbach & Pratt, 2007); open-plan offices foster collaboration and transparency but can also lead to noise and distractions, negatively affecting focus and stress levels. Leaders with solid aesthetic judgement can anticipate these outcomes and design spaces that balance functionality with aesthetic appeal, thus enhancing individual and organisational performance.

Aesthetic judgement also plays a crucial role in branding and organisational identity. The visual and sensory elements of branding (logos, packaging, advertising, retail space ambience) are designed to evoke specific emotions and convey the organisation's values and mission (Schroeder, 2002). A leader's ability to make aesthetic decisions in this context can determine

how efficiently the organisation's identity is communicated to internal and external audiences.

Aesthetic judgement is integral to creating and maintaining organisational culture; culture is transmitted through policies and procedures and the organisational sensory and symbolic environment (Strati & DeMontoux, 2002). Rituals, ceremonies, and practices carry aesthetic dimensions reflecting and reinforcing cultural values (Gagliardi, 2006). Organisational symbols, uniforms, or specific colour schemes communicate hierarchy, unity, or creativity.

However, the exercise of aesthetic judgement in organisational contexts is challenging. The subjective nature of aesthetic experience means that what is perceived as beautiful or appropriate by one individual may be seen differently by another. This variability can lead to conflicts or misunderstandings, particularly in diverse organisations where cultural differences shape aesthetic preferences (Schroeder & Zwick, 2004). To navigate these challenges, leaders must develop a nuanced understanding of their own and their stakeholders' aesthetic preferences and negotiate and reconcile these differences to support organisational objectives.

The increasing emphasis on sustainability and ethical practices in organisations has expanded the scope of aesthetic judgement. Decisions about design, materials, and processes are evaluated for their aesthetic appeal and environmental and social impact (Riisberg et al., 2015). This evolution reflects a broader understanding of aesthetics encompassing beauty, function (truth), and ethical (good) considerations.

Fostering creativity and innovation through aesthetic sensitivity

Aesthetic sensitivity, defined as the ability to perceive and appreciate the subtle qualities of sensory experiences, plays a crucial role in fostering creativity and innovation within organisations. The link between aesthetics and creativity is increasingly recognised in management studies, where work's sensory and affective dimensions are vital drivers of innovative thinking (Strati, 1999). Aesthetic sensitivity enables individuals and organisations to engage with their environments in ways that transcend the purely functional, allowing for the emergence of novel ideas and solutions that can drive competitive advantage.

Creativity in organisational contexts often involves breaking away from established patterns. Aesthetic sensitivity facilitates this process by encouraging a more open and exploratory mindset: exposure to diverse art, music, and design forms can stimulate cognitive processes associated with divergent thinking, essential for generating creative ideas (Leder et al., 2004). By engaging with sensory stimuli, individuals develop a richer experience palette to draw upon when faced with complex problems.

The workplace's physical environment is another area where aesthetic sensitivity can profoundly impact creativity and innovation by influencing cognitive processes and emotional states (Dul & Ceylan, 2011): natural light and access to outdoor views improve mood and cognitive function, enhancing creative problem-solving abilities; flexible and modular spaces encourage collaboration and the free flow of ideas.

Aesthetic sensitivity is vital in organisations perceiving and responding to emerging trends and opportunities. In a rapidly changing business landscape, the ability to sense and interpret weak signals can be a critical determinant of success (Mintzberg & Westley, 2001). Aesthetic sensitivity allows leaders to pick up on these subtle cues, whether they are shifts in consumer preferences, changes in the competitive environment, or new technological possibilities. This heightened perceptual acuity enables organisations to anticipate and adapt to change more effectively, positioning them at the forefront of innovation.

Moreover, integrating aesthetic sensitivity into leadership practices can lead to more holistic and human-centred approaches to innovation. Traditional approaches to innovation often focus on technological advancements and efficiency gains, sometimes at the expense of the human experience (Schumpeter, 1949). However, when leaders apply aesthetic sensitivity, they are more likely to consider their innovations' emotional and experiential dimensions (Verganti, 2009). This can result in products, services, and processes that meet functional requirements and resonate with users on a deeper, more meaningful level (Szostak, 2025).

Fostering aesthetic sensitivity within organisations enhances the ability to work with and across different disciplines. Innovation frequently occurs at the intersection of diverse fields, where different perspectives and forms of knowledge converge. Aesthetic sensitivity facilitates this interdisciplinary

collaboration by promoting an appreciation for the unique contributions of different disciplines and by encouraging a more integrative approach to problem-solving (Barry & Meisiek, 2010). In product design, the collaboration between engineers, designers, and marketers can be enriched by an aesthetic sensibility that values both the technical and the experiential aspects of innovation.

Developing aesthetic sensitivity within organisations requires deliberate effort involving exposure to diverse sensory experiences and cultivating an organisational culture that values and encourages aesthetic engagement. Leaders are critical in this process by modelling aesthetic sensitivity in their behaviours and decisions and creating opportunities for employees to develop and express their aesthetic capacities through initiatives like art-based training programs, creative workshops, or even simple changes to the physical environment that enhance aesthetic quality (Taylor & Ladkin, 2009).

Addressing organisational contradictions with aesthetic judgement

Organisational contradictions, manifesting as competing demands, paradoxes, and tensions, are inherent in the complex contemporary environments. These contradictions arise from various sources, such as conflicting stakeholder interests, balancing short-term efficiency with long-term innovation, or simultaneously pursuing stability and change (Smith & Lewis, 2011). Addressing these contradictions requires more than rational analysis and strategic planning; it demands a nuanced approach integrating cognitive, emotional, and sensory dimensions.

Unlike purely rational judgement, which often seeks to categorise and simplify, aesthetic judgement embraces complexity and ambiguity, recognising that contradictions may not always have clear-cut solutions (Strati, 1999). Instead, aesthetic judgement allows leaders to appreciate the inherent tensions within organisational contexts and find creative ways to balance or integrate opposing demands. By carefully considering the tone, imagery, and symbolism in communication, a leader can address the paradoxical demands in a way that resonates with diverse audiences.

Aesthetic judgement is instrumental in managing contradictions that involve cultural and symbolic dimensions within organisations. Organisational

culture is often rife with symbolic tensions like the contrast between hierarchical authority and collaborative teamwork or the balance between tradition and modernity (Gagliardi, 1990). These tensions are not easily resolved through rational decision-making alone, as they involve deeply held values and identities.

The role of aesthetic judgement in addressing organisational contradictions is also evident in design and innovation. Organisations often face the challenge of reconciling the need for functional efficiency with the desire for aesthetic appeal in product design (Verganti, 2009). These two objectives are contradictory, with functionality emphasising practicality and cost-efficiency while aesthetics focuses on sensory perception and emotional engagement. By aesthetic judgement, leaders can transcend this opposition and recognise that functionality and aesthetics are not mutually exclusive but can be integrated into both functional and beautiful products.

Aesthetic judgement is crucial in resolving organisational change and continuity contradictions. Change initiatives generate resistance because they threaten established practices and identities, creating a tension between the desire for innovation and the need for stability (Beech et al., 2004). Aesthetic judgement helps leaders navigate this tension by shaping change processes sensitive to organisational life's emotional and symbolic aspects. A leader might use aesthetic elements such as narratives, symbols, or visual imagery to frame change and connect it to the organisation's core values and history.

Aesthetic judgement is pivotal in ethical decision-making, particularly when organisations face contradictions between profit motives and social or environmental responsibilities. In such cases, aesthetic judgement guides leaders in evaluating the broader impact of their decisions, considering the economic outcomes and the ethical and aesthetic implications (Riisberg et al., 2015). This broader perspective enables leaders to address contradictions that align with the organisation's values and long-term sustainability goals rather than merely pursuing short-term gains (Szostak, 2024a).

Despite its benefits, applying aesthetic judgement in addressing organisational contradictions is not without challenges. One of the primary difficulties is its inherent subjectivity, which can lead to differing interpretations and disagreements among stakeholders. To overcome this challenge, leaders should cultivate

an environment that encourages open dialogue and the exchange of diverse perspectives. This inclusivity allows for a richer and more nuanced understanding of contradictions, enabling leaders to apply aesthetic judgement in a way sensitive to different viewpoints and aligned with the organisation's strategic objectives.

Conclusions

Answering the first research question (1. How do subjective aesthetic experiences (including sensory perceptions and emotional responses) influence leaders' decision-making processes and ability to manage organisational paradoxes and complexity?) it can be said that subjective aesthetic experiences, encompassing sensory perceptions and emotional responses, significantly influence leaders' decision-making processes by providing a richer, more nuanced understanding of complex organisational dynamics. These experiences allow leaders to perceive subtle signals and underlying tensions within their environment, which may not be accessible through purely rational analysis. For instance, sensory perceptions, such as the physical environment's design or the emotional tone of interactions, can inform leaders about the unspoken undercurrents that shape organisational behaviour. This heightened sensitivity aids in recognising and addressing paradoxes – such as the need to balance stability with change – by allowing leaders to engage with the non-rational, affective dimensions of these challenges. In doing so, aesthetic experiences help leaders craft innovative and contextually appropriate solutions, enabling them to manage complexity more effectively by integrating conflicting demands into a cohesive strategy.

Regarding the second research question (2. How do embodied perception, multisensory engagement, and aesthetic judgments enhance the efficiency of dialectical leadership in resolving tensions and fostering creativity within organisations?), it can be stated that embodied perception, multisensory engagement, and aesthetic judgments enhance the effectiveness of dialectical leadership by facilitating a more holistic approach to resolving organisational

tensions and fostering creativity. Embodied perception (leaders' awareness and interpretation of their physical presence and sensory experiences) enables them to connect more deeply with the realities of their organisation, making them more attuned to the emotional and symbolic aspects of leadership. Multisensory engagement, involving the integration of various sensory inputs, enriches leaders' understanding of complex situations, allowing them to draw on a broader range of experiences when making decisions. Aesthetic judgments, which involve evaluating and appreciating the sensory and affective qualities of different scenarios, help leaders to navigate contradictions by finding a balance between opposing forces, such as efficiency and innovation or tradition and modernity. Together, these elements foster a leadership style adepting at managing paradoxes and unlocking creativity within the organisation by valuing and incorporating diverse perspectives and sensory experiences into the decision-making process.

Among the limitations of this research can be listed: 1) the reliance on a literature review means that the findings are not supported by original empirical research; 2) the exploration of aesthetic experiences in leadership is inherently subjective, which may lead to varying interpretations and applications across different contexts; 3) the primarily focus on the positive aspects of aesthetic sensitivity in leadership, potentially overlooking situations where aesthetic judgement might conflict with other critical factors such as ethical considerations or operational efficiency.

The perspectives of future research related to the above considerations may be: 1) testing the theoretical insights provided, e.g., examining how leaders in different sectors utilise aesthetic judgement in practice; such studies could involve qualitative methods, such as case studies or interviews, to capture the richness of aesthetic experiences in leadership; 2) verifying potential tensions between aesthetic judgement and other decision-making criteria, such as ethical standards or cost-effectiveness; 3) analysing the impact of cultural differences on the perception and application of aesthetics in leadership: how leaders operating in multicultural environments may face unique challenges in integrating aesthetic sensitivity into their decision-making processes.

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Gail T. Fairhurst

School of Communication, Film, & Media Studies

University of Cincinnati, USA

fairhug@ucmail.uc.edu

ORCID ID: 0000-0001-9225-8284

Spencer G. Hall

School of Communication, Film, & Media Studies

University of Cincinnati, USA

hall4sr@uc.mail.edu

ORCID ID: 0009-0009-2375-3893

Discursive Leadership and Material Concerns: The Union Context

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Abstract: This paper explores discourse-material relationships in union leadership contexts. We searched several databases and journals across the social sciences, focusing on the negotiative, relational, material, and cultural aspects of union leader and rank-and-file discourse and communication. We found 33 discursive leadership studies and conducted a thematic analysis to find three material themes broadly reflected in the literature: economics (wages, benefits), bodies (gender, race), and technology (surveillance, social media, automation). We address the implications of these findings in terms of the relevancy of retaining the term 'discursive leadership' and the necessity for further studies on discourse-material pairings in union contexts.

Keywords: discursive leadership, discourse, materiality, unions

Introduction

The study of discursive leadership has proceeded in fits and starts since the linguistic turn in Western philosophy, which focused on language as constitutive and not merely reflective of social reality (Rorty, 1967). 'Starts' included early work by Gronn (1983), Komaki (1998), and Fairhurst (Courtright et al., 1989; Fairhurst et al., 1995), which positioned talk and interaction as central, defining, and constitutive of leadership processes. Fairhurst (2007) subsequently referred to 'discursive leadership' as a communicative lens that was as central

to leadership processes as a cognitive lens, which has dominated leadership study since its inception (especially in the U.S.).

Discursive leadership captured the many forms of discourse analysis that could be applied to leadership and followership, including those involving language and social interaction (little 'd' discourse) and sociohistorical systems of thought (or big 'D' Discourse) (Alvesson & Kärreman, 2000; for reviews, see Fairhurst & Putnam, 2014; Putnam & Fairhurst, 2001). Leadership studies using conversation analysis (Boden, 1994; Gronn, 1983), narrative analysis (Parry & Hansen, 2007; Watson, 2001), semiotic analysis (Fiol, 1989), relational control analysis (Courtright et al., 1989; Fairhurst et al., 1995), critical discourse analysis (Brenton, 2009; Wodak et al., 2011), dialectics (Fairhurst et al., 2002; Kreiner et al., 2015), Foucauldian analysis (du Gay et al., 1996; Parker, 2005) and more appeared in the literature with growing frequency. Instead of surveys and seven-point scales that retrospectively summarize the ebb and flow of social interaction (Fairhurst, 2007), these studies focus on meaning construction and negotiation, sequence and temporal form, category work, power effects, storytelling, relationship markers, identity work, and the like to say something about the dynamic patterns and micro--foundations of leadership and followership (Fairhurst & Uhl-Bien, 2012; Fairhurst & Connaughton, 2014).

However, 'fits' or, more precisely, the social science twists and turns that upend current thinking, must include the decentering of discourse relative to that of materiality wrought by new materialism (Barad, 2003; Kuhn, 2024; Kuhn & Simpson, 2020; Kuhn et al., 2017) and communicative constitution of organizations (CCO) perspectives (Cooren, 2004, 2018; Taylor & Van Every, 2000). While Fairhurst's (2007) discursive leadership includes a chapter on material mediations in charismatic leadership, in fact, CCO perspectives relegate her Foucauldian view to social constructionism, which gives primacy to d/Discourse (Putnam, 2015). While a rapprochement casts discourse and materiality in a dialectical relationship (Cloud, 2011; Mumby, 2005; Putnam, 2015), new materialism's relational ontology transcends this dichotomy altogether by rejecting the view that the material world is a separate external reality (Orlikowski & Scott, 2015). On the contrary, it is a fully-fledged co-participant

in constituting actions and practices (Barad, 2007), evolving organically as "buzzing hives of *sociomaterial* activity" (Kuhn et al., 2017, p. 39, emphasis added).

What, then, are we to make of 21st century discursive leadership? Certainly, many discourse scholars are now focusing on sociomaterial practices and performances, animated by a focus on leadership bodies (Ford et al., 2017; Johansson et al., 2017; Sinclair, 2005), texts (Holm & Fairhurst, 2018), objects (Cooren et al., 2012; Deye & Fairhurst, 2019), and spaces (Fairhurst & Cooren, 2009; Van De Mieroop et al., 2020). In this work, material actants are as likely to surface as much as human actants, with varying attempts to explain their hybridity, that is, how human and material actants are made different by the presence of the other (Latour, 1994).

However, there is still much we do not know about the discourse-materiality relationship (Putnam, 2015), especially for the study of leadership and followership (Fairhurst, 2007). For example, scholars often reject an equally constitutive relationship between discourse and materiality in empirical settings in favor of what Suchman (2007) calls a 'durable dissymmetry.' Here, materiality asymmetrically mediates the discursive based on the nature of the (historical or organizational) practices involved (Putnam, 2015). In effect, discourse and materiality reflexively influence one another, but not to the same degree (p. 713). Additionally, some material influences are much less dependent upon the presence of discourse or the symbolic realm (Reckwitz, 2002), such as the occasioning of leadership based on catastrophic effects from the natural world (Fairhurst & Cooren, 2009). Finally, in any given leadership setting, multiple types of materiality are present in objects, sites, and bodies, although it is common for scholars to focus narrowly on only one form of materiality (Hardy & Thomas, 2015). Thus, multiple materialities likely play a *constitutive* role along with discourse, but are they *consequential* for leadership and followership? The challenge, in most instances, is to decipher the latter.

For these reasons, we sought to understand one particular understudied discursive leadership context, which is that of unions (Kaminski, 2023). While unions regularly make the news and are a familiar labor relations context, as we will show, studies of the *discourse* of union leadership and membership are relatively infrequent. Not only that, but the discourse-materiality relationship has been a source of critique in this work, with the centrality of discourse questioned (Cheney & Cloud, 2006; Cloud, 2005). One other complicating factor has been the emergence

of dissident union leaders who oppose not only management, but their own union leadership (Cloud, 2011). Thus, power and politics figure prominently, a topic of relative neglect in CCO predisposed to equally weighting the symbolic and material.

Thus, in this paper, we pose three research questions. First, how does union leadership and membership emerge through a discursive and material lens? Second, what does this mean for the study of discursive leadership? Third, what does this mean for the study of union leadership? We begin by defining the terminology used in this paper.

Definitional criteria

We articulate our definitions for the very simple reason that much of the terminology in this paper is elsewhere contested or vague, especially for our central themes of discursive union leadership and materiality (Alvesson & Kärreman, 2000; Cloud & Cheney, 2006; Fairhurst et al., 2024). Below we define these and related terms such as relationality, culture, negotiative aspects, and performativity.

With one exception, we define 'leadership' in keeping with DeRue (2011, p. 126), as "a social interaction process where individuals engage in repeated leading–following interactions, and through these interactions, co-construct identities and relationships as leaders and followers. These leader–follower identities and relationships are influenced but not entirely constrained by formal authority structures, such that the direction of influence in leading–following interactions can move up, down, and/or lateral in formal organizational structures." We prefer this broad definition to capture leadership's plasticity and the ways it may be accorded to formal roles, informal shifts toward expertise or task advancement in group settings (regardless of role), and influential acts of organizing (Fairhurst et al., 2024), all of which might elicit attributions of leadership in union settings. However, instead of "social interaction," we would say "sociomaterial interaction" to better reflect the social and material (Fairhurst & Putnam, 2024).

'Unions' are labor or trade organizations whose primary purpose is to accord workers more power in relations with their employers (Cloud, 2011). Unions organize workplaces, bargain for higher wages and more benefits, seek

enforcement of laws intended to ensure labor's safety and health, and more (Kelly & Frege, 2004; Mishel & Walters, 2003). 'Union leadership' can be found in formally elected positions, but also in the dissident organizing found in union democracy groups dissatisfied with the way union leaders represent rank-and-file interests (Cloud, 2011). Such informal leadership comes directly from the rank-and-file and mobilizes resistance towards management *and* union leadership.

We define 'discourse' in two ways, the first of which considers systems of meaning, history, culture, and power (Bakhtin, 1981, 1984; Foucault, 1975, 1983). This approach is also known as big 'D' Discourse (Alvesson & Kärreman, 2000; Cooren, 2015), which focuses on time-bound cultural assumptions and core ideas of language and thought systems (Fairhurst & Putnam, 2019). The second way is little 'd' discourse, which focuses on language use in unfolding scenes of social interaction. Here, analysts might focus upon sequential behavior, category use, silences, talk-overs, and the like. Both terms conflate with 'communication,' the most common term across social science disciplines. Thus, in union leadership communication studies, we must look to see whether d/Discourse is further specified.

'Relationality,' or 'organizing potential,' refers to the ways in which people use language and social interaction (little 'd' discourse) to position themselves and materialities with respect to one another. In effect, they define themselves *relationally* through sequential behavior (first/second), category use (inclusion/exclusion), talk-overs (dominance/submission), and so on. The repetition of such patterns form the micro-foundations of *organizing* (Boden, 1994); for example, in the ways that talk time, talk-overs, and forms of address can signal relational dominance and status.

We define 'culture' in terms of big 'D' Discourses. While Discourses can only surface in little 'd' discourse, the former is evidenced by the repertoire displayed i.e., the tool bag of terms, arguments, stories, materials, and actions (Potter & Wetherell, 1987; Wetherell, 1998). These tool bags are relatively easy to spot because they have a ring of familiarity and they 'go together' thematically, much the way any given sport has its own interconnected vocabulary (Fairhurst, 2011; Fairhurst & Putnam, 2019). As such, this is a particularly useful way to capture international and intercultural differences in union leadership communication vis-à-vis the linguistic, behavioral, and material tool bags deployed.

'Negotiative aspects' is a special case of the organizing potential of language and social interaction (or little 'd' discourse) because of its relevance to the union context in which bargaining and negotiation occur on a regular basis (Putnam, 2004; Putnam et al., 1990). As Sweetman (2018, p. 245) argues, "Trade or labor unions are historically the democratizing force in the economic sphere of life, having been pivotal in bringing about collective bargaining over wages, weekends, the eight-hour day, and a host of other worker rights and protections" (see Dray, 2010; Hobsbawn, 1996; Zinn, 1980).

Finally, while some treat materiality as a "catch-all category for the hard stuff of existence" (Cheney & Cloud, 2006, p. 511), the union context requires that we define materiality in at least two ways. First are the economic and structural forces as they impact agency and discourse in organizational life (e.g., wages, benefits), while the second focuses on the physical aspects of work life involving bodies, texts (e.g., schedules), technology, spaces, and so on (Cloud, 2005, 2011; Fairhurst & Putnam, 2014).

In turn, 'performativity' is akin to how the material and social/discursive combine (read, sociomaterial) to 'matter' with respect to the enactments and practices of organizational life (Barad, 2007; Kuhn et al., 2017). This would include those of union leadership and rank-and-file membership.

In short, our goal is to articulate something of the performative nature of discursive leadership in union contexts. We seek to understand its underpinnings from which we draw broader lessons about the relationship between discourse and materiality in this understudied, yet instructive work context. What follows next is a discussion of our methods.

Methods

We started our review of literature searching for articles that generally centered on leadership in labor union contexts. To find these resources, we searched several databases, including Leadership & Management Source, Communication Source, Business Source Complete, SocINDEX, Psychology & Behavioral Sciences Collection, and JSTOR. This yielded a multitude of journals (e.g., *Gender,*

Work And Organization, Gender & Society, Work And Occupations, Labor Studies Journal, ILR Review, International Migration Review, Management Communication Quarterly, Journal of Industrial Relations, Social Problems, British Journal of Industrial Relations, Negotiation Journal, Journal of Applied Communication Research, Labor Studies Journal, and *Critical Studies in Media Communication*) across the communication, management, psychology, economics, and sociology disciplines.

In each database, we looked for articles using key words such as unions or union campaigns; leadership and related terms including authority, membership, and rank-and-file; communication, d/Discourse, and/or negotiation; culture or nationality; organizing or organization; and various material forms (e.g., wages, bodies). This review of the databases yielded 33 references and the creation of Table 1, which we categorize by their year of publication to capture the evolution of ideas and trends in union leader and rank-and-file communication over time.

We primarily focused on journal-based research and, to a much lesser extent, books and book chapters. We separately considered papers that were exclusively survey research (e.g., transformational leadership style), which have implications for union leadership communication, but not the broader discourse-materiality relationship (11). We also separately considered papers involving organized resistance, which have implications for union and dissident union leadership, but are not specific to the union context (29). (Both survey and resistance tables are available upon request.)

After creating Table 1, we thematically analyzed the papers based on how they spoke to the discourse-materiality relationship. Given this scope, a thematic analysis was best suited to capturing how the mix of our key terms configure in the literature to which we now turn.

Discursive-material union leadership studies

As we surveyed the research in Table 1, three dominant themes surrounding the discourse-materiality relationship emerged: 1) discourse and economics, 2) discourse and gendered/racialized bodies, and 3) discourse and technology.

Discourse and economics

Across many union contexts, unions generally yield higher wages and other economic benefits for workers than non-union shops (Burgoon et al., 2010; Kerrissey & Meyers, 2022). Union and company leaders are often, although not always, the chief bargaining agents (Donohue et al., 1984). Yet, as Table 1 demonstrates, there is very little journal research that establishes a direct link between unions' negotiative capacity and wage increases or, for that matter, any formal or informal union leadership communication and direct material gain (or loss). Rather, using naturalistic interactions, researchers have been fascinated by the negotiation process itself. There is a long history of parsing arguments in policy deliberations (Putnam et al., 1990), fantasy themes in bargaining rights (Putnam et al., 1991), rhetorical tropes in bargaining formulas (Putnam, 2004), and different negotiation phases, tactics, and strategies (Bednar & Curington, 1983; Donohue et al., 1984; Putnam, 1995; Putnam et al., 1990).

Cloud (2005, p. 516) is very critical of this lack of attention between discourse and economics: "To examine texts to the exclusion of the material contexts in which they operate is to miss important features of organizational life, namely the real demands for material redress and the real antagonisms among divergent interests that are economic as well as discursive." Others like Reed (2000, 2004) and Conrad (2004) argue against 'discourism,' which melds the material into the discursive, thereby ignoring what Marx (1906) suggested was a dialectical relationship between lived experience and the economy i.e., separate but interdependent influences.

Ironically, work by Kochan (1980) and Bednar and Curington (1983, p. 401) made an early case for the complementarity of economic and behavioral science models of negotiation:

> First, many economic theories imply that strikes can result from mistakes in bargaining. This analysis can be amplified by determining whether the interaction patterns leading to impasse differ from those leading to settlement. Second, concession behavior can be studied to see whether, or under what circumstances, concessions are reciprocated and how concession rates change as negotiations progress. A related question is whether concession patterns change with the onset of a strike.

However, Bednar and Curington did not actually link aspects of their coding scheme to material outcomes; they merely argued for its possibility. Like many in the 1970's and 80's, they cast communication as simple information transmission and receipt ("the process of sending and receiving messages," p. 390). This generalized view of communication strips the negotiation process of meaning, power, history, and culture, although Bednar and Curington were careful to demarcate bargaining phases. Whether or not leadership was occasioned was not mentioned.

Similarly, Donohue et al. (1984, p. 423) argued that negotiation studies often fail to impart interactants' sense of coherency from the discourse, such as how specific tactics might contribute to some overall strategy, the multi-functionality of utterances, and the simultaneity of mixed motive situations in which one is "cooperative and competitive almost in the same breath." Putnam's (2004) work tried to capture that sense of coherency from teacher negotiations by showing how bargaining formulas emerge from the way dialectical tensions (e.g., contract language vs. money; control vs. yielding) play out in the discourse.

Others have called attention to the divided loyalties that surface in negotiation contexts because of formal and informal allegiances among interacting groups that develop outside of the negotiation context (Putnam, 1994), although here, too, leadership of these groups was not a focus. However, outside information management by union leaders and company officials does impact the negotiative context (Bednar & Curington, 1983; Donohue et al., 1984; Putnam, 1994), which can help form such allegiances and, presumably, economic outcomes. Finally, Holm, Fong, and Anteby (in press) assert that how management chooses to address successfully negotiated concerns matters every bit as much as whether and how workers voice their concerns in the first place. Their study of Disney puppeteers found that while management met their contractual demands, the company simultaneously reduced their dependency upon puppeteers, in turn, diminishing the impact of their voice.

In short, power dynamics and the complexity of the communication process pose significant challenges to directly linking economic outcomes to negotiations or to formal or informal union leadership communication of any kind. While we are of the opinion that it can still be done, it is much more likely

that more comprehensive, critical, and ethnographic forms of research are necessary beyond a sole reliance on tapes of bargaining sessions, interview data, or surveys with the relevant parties, as the current research suggests.

Discourse and gendered/Racialized bodies

While unions play a role in social and economic change for the workers they represent, historically they have also perpetuated gender, racial, and ethnic inequalities (Cranford, 2007; Bronfenbrenner, 2005; Kerrissey & Meyers, 2022). This includes limitations on how historically oppressed and marginalized populations lead (Bryant-Anderson & Roby, 2012; Kirton & Healy, 2012) and barriers to entry in leadership positions within many union contexts (Bronfenbrenner, 2005; Twarog et al., 2016). Unfortunately, there is not a lot of union discursive leadership research from which to draw inferences around the intersectionalities of gender and race, but what little research there is suggests more complexity. For example, gendered and racialized bodies are readily observable as categories of actors, but elided are issues of bodily presence, body language, body work, and embodied knowledge (cf. Lundemark, 2021), in contrast to the leadership literature more generally (Fisher & Robbins, 2014; Ford et al., 2017; Ropo & Parviainen, 2001; Ropo & Sauer, 2008; Sinclair, 2005). Sexism and racism in the modern workplace is also more covert than overt. In part, this is due to structural token dynamics, in which the ratio of majority to minority members alone may create added performance pressure, social isolation, and role entrapment i.e., stereotyping (Kanter, 1977; Fairhurst & Snavely, 1983a, 1983b).

Gendered Bodies. Consider gender issues around leadership style (Franzway, 2000). Women and men both must handle the commitment, workloads, and emotional labor required by union leaders (Franzway, 2000). Stereotypes and societal expectations play a significant role in shaping leadership styles, with women often expected to exhibit nurturing, empathetic, and collaborative behaviors, while men are expected to be assertive, decisive, and authoritative (Bryant-Anderson & Roby, 2012; Kirton & Healy, 2012; Franzway, 2000). Women and other minority leaders might also experience imposter syndrome or

self-doubt due to pervasive negative stereotypes, which can influence their confidence and behavior as leaders.

Yet, women union leaders can draw on their diverse experiences and identities to build resilience and authenticity in their leadership style (Bryant-Anderson & Roby, 2012; Cranford, 2007). In contrast to traditional leadership models stressing compliance with authority, this can result in a more inclusive, empathic, and community-focused approach to leadership, which can foster greater solidarity and support within their union organizations. Additionally, when biological differences cause their gender to be treated differently as leaders, women develop distinctive strategies to navigate biases and stereotypes – including capitalizing upon them.

For example, consider the case of 'Mother' Mary Harris Jones (Tonn, 1996), an Irish-American labor organizer for the United Mine Workers at the turn of the 19th century. Jones adopted a 'militant motherhood' leadership style, alternating between feminine cultural expectations of the time (e.g., women as mothers, not bread-winners) and the expected (masculine) nature of leadership in the 1910's stressing strength and dominance (Tonn, 1996). As a community organizer, Mother Jones adopted a nurturing role towards the rank-and-file (e.g., referring to workers as "her boys"), while also being a confrontational leader and successful agitator for the cause of labor. She simultaneously affirmed gender expectations with an orientation to 'family,' while forcefully challenging the very same expectations to battle union officials seeking to exclude women and migrant workers. As a skilled orator, her use of stories was especially effective in creating solidarity and increasing collective action (Tonn, 1996).

More recently, Kirton and Healy (2012) compared union women in leadership positions in the UK versus the US, showcasing how cultural differences affect how women discursively construct leadership when they face a dominant male culture. Like Mother Jones, Kirton and Healy found that women union leaders often simultaneously engaged in both masculine and feminine/feminist leadership talk patterns, although US and UK women tended towards different combinations of them. By studying the d/Discourses in these situations and others, we learn the ways union women lead differently from men (Franzway, 2000) and the ways they may develop differently as leaders. As such, the literature consistently points

to the necessity of creating equitable opportunities for professional growth and leadership training in order to develop the skills and confidence needed to excel (Sweetman, 2018; Bronfenbrenner, 2005; Kirton & Healy, 2012; Twarog et. al, 2016).

Racialized Bodies. Like women in general, women of color are often absent from leadership positions, even in unions where they are the demographic majority (Bronfenbrenner, 2005; Sweetman, 2018). Gapasin (1998) argues that unions must address its governance structure and organizational culture, while Sweetman (2018) wants them to fight against institutionalized racism through winning the trust of minority members and making leadership look more representative.

For example, consider Foerster's (2004) case study of a Black led union with many other racial groups making up the membership. To foster racial solidarity, Foerster charted d/Discourses that helped coalesce a shared identity of working--class individuals based on common struggles and shared interests. Union leadership specifically expanded its definition of itself as an organization with a "panethnic black identity" to integrate newcomers from immigrant populations (Foerster, 2004, p. 404). However, the organization's culture, with its history of building and valuing inclusion, also fostered the extant structures necessary to handle the waves of immigrants coming through. This, in turn, provided union leaders and members with the cultural repertoires necessary to link immigrant union workers' current struggles with the historic struggles of the union's pioneers.

However, Lundemark (2021) shows how the construction of migrant workers in two Danish trade unions vis-à-vis class and trade union practice were bound up with union officials' discursive constructions of nation, ethnicity, and race. Semiotic elements such as language facility were a primary focus, but material elements such as bodily appearance, especially for non-European/non-western migrant backgrounds, were also salient. Instead of the inclusionary practices of Foerster (2004), Lundemark draws attention to the exclusionary union practices of ignorance/denial and misrepresentation legitimized by drawing on Discourses of nation, colour-blind universalism, and Nordic exceptionalism.

Overall, unions have had a complicated history with respect to immigrants' racialized bodies. According to Burgoon et al. (2010, p. 937), "The labor movement

has been neither uniformly restrictionist towards immigrants nor uniformly solidaristic with them." More research is necessary to learn how unions enroll these workers and the differences minority leaders can make in union campaigns, much the way Latino labor leaders shaped the political perspectives of Mexican American workers in the first four decades of the 20th century (Sanchez, 1994; cited in Burgoon et al., 2010). The United Farm Workers grassroots movement in the 1960's similarly saw Cesar Chavez mobilize immigrant farm workers to achieve victories against powerful agricultural interests. His charismatic leadership style, ability to relate to farm workers, and strategic insight proved integral to his success (Ganz, 2009). These examples and others show minority representation in union leadership is critical to enrolling and engaging minority union members (Sweetman, 2018).

In sum, while unions have been pivotal in advocating for workers' rights and material gains, gender and racial inequalities persist (Cranford, 2007; Bronfenbrenner, 2005, Kerrissey & Meyers, 2022). The overall decline of unions and scant numbers of women, Blacks, and Latinos in union leadership positions explain the dearth of research (Twarog et al., 2016). But the need to understand both the constraining and inventive ways (e.g., identity management) in which they lead in order to foster solidarity and inclusivity is all important given their rising union membership (Burgoon et al., 2010). Also, excepting Lundemark (2021), union leadership research implies corporeal practices (e.g., Mother Jones), but does not actually explore the embodied, material, and mundane aspects of gendered or racialized leadership bodies. Another key sociomaterial realm that may influence union leadership communication is that of technology.

Discourse and technology

In the contemporary labor movement, technology plays a crucial role in shaping organizational practices and the experiences of workers (Tauman & Weiss, 1987). The dynamics between discourse and technology tie directly to a technology's affordances, which are its enablements and uses (Gibson, 1986; Treem & Leonardi, 2013). The material changes wrought by technology alter the physical and organizational aspects of work, requiring unions to adapt their

strategies (Tauman & Weiss, 1987). Here, too, there is not a lot of empirical work, but there is the added wrinkle of new and rapidly changing technologies and union leaders' need to keep current with them (Panagiotopoulos & Barnett, 2015). Nevertheless, we explore three key areas where technology intersects with labor movements, including surveillance, automation, and social media.

Surveillance. Surveillance technology in labor movements represents a significant site of tension between employers and employees. Discourses that arise surrounding surveillance are often framed around issues of control, efficiency, privacy, and power (Bennett & Taras, 2002; Hilstob & Massie, 2022; Hogan et. al, 2010). For example, 49 out of 50 states in the U.S. are at--will employment states, effectively giving employers termination latitude and employees the freedom to switch jobs. While union contracts play a role in articulating criteria for termination, there are still laws in place that can get one fired for something as minor as smoking on or off the clock. Employers advocate for surveillance technologies as tools for efficiency, safety, and accountability, arguing that monitoring employee activities ensures productivity and compliance with workplace standards. However, from the workers' perspective, surveillance is frequently perceived as a mechanism of control and undermines the power of the union (Hennebert et al, 2021). Although citizens may appreciate surveillance if it makes them feel safer in potentially unsafe environs (Sewell & Barker, 2006), employees resist being watched constantly by management. As such, there is significant pushback against invasive surveillance practices, with unions advocating for stricter regulations and transparency regarding the use of monitoring technologies (e.g., CCTV, biometrics, surveillance tracking systems, and so on), along with technology in general (Lommerud & Straume, 2012, Ajunwa et al., 2017). The presence of these surveillance devices in the workplace physically embodies the power dynamics at play, either making the discourse of control and autonomy tangible (Ajunwa et al., 2017) or opaque by shifting attention away from other critical issues (Harness et al., 2024).

Social Media. Social media (e.g., social networking sites, discussion forums, image-sharing networks, and so on) are powerful tools for labor movements, transforming the way unions organize, communicate, and advocate for workers' rights. Their democratizing potential allows workers to organize across digital

spaces (Carneiro & Costa, 2022), amplify their voices, and build solidarity across geographic boundaries (Panagiotopoulos & Barnett, 2015; Treem & Leonardi, 2013).

One of the primary affordances of social media is its unparalleled capacity for rapid communication and widespread dissemination of information (Carneiro & Costa, 2022). This immediacy and broad reach can amplify union campaigns, drawing national or even international attention to local labor disputes and enhancing solidarity among workers (Hennebert et al, 2021; Panagiotopoulos & Barnett, 2015). Social media also facilitates grassroots organizing by allowing unions to connect with workers who might not be reached through traditional means, such as young adults, migrants, or people of color (Carneiro & Costa, 2022, p. 41). Additionally, these platforms provide a space for unions to share success stories, educate members about their rights, and counteract negative narratives propagated by anti-union entities.

However, these affordances come with significant constraints. First, the open and public nature of social media means that unions are constantly under the scrutiny of employers, who can monitor union activities and potentially use the information to undermine organizing efforts (Hennebert et al., 2021). This surveillance can lead to increased tensions and retaliation against union activists. Second, the fast-paced and transient nature of social media interactions can dilute the depth and quality of engagement (Leonardi & Treem, 2020), making it challenging to foster sustained commitment and active participation among members (Panagiotopoulos & Barnett, 2015, Carneiro & Costa, 2022). Third, reliance on social media can create a digital divide, excluding workers who may not have access to these technologies or are less comfortable using them. This can lead to a fragmented membership base and unequal representation within the union (Panagiotopoulos & Barnett, 2015). Finally, the risk of misinformation and the spread of false narratives also pose significant challenges, as unions must constantly monitor and address misleading information that could damage their credibility and cause internal conflicts.

Despite these constraints, the strategic use of social media remains a powerful tool for labor unions, offering new roads for organizing, advocacy, and member

engagement – if leaders choose to use these new technologies, which some research suggests they have yet to embrace (Panagiotopoulos & Barnett, 2015).

Automation. Automation represents another critical intersection of discourse and materiality in labor movements. The introduction of automated technologies, such as robotics and artificial intelligence (AI) is on the rise. Organizations large and small are implementing AI tools like ChatGPT into their workflow to improve efficiencies and achieve high levels of performance (IRI Consultants, 2024). But it has also sparked significant debate over the future of work, especially for unions. The d/Discourse is polarized between narratives of progress and displacement (Hilstob & Massie, 2022; Kostøl & Svarstad, 2023; Nissim & Simon, 2021).

Specifically, proponents of automation emphasize a d/Discourse of innovation and efficiency (Nissim & Simon, 2021). They argue that automated technologies enhance productivity, reduce human error, and allow workers to focus on more complex and creative tasks. Conversely, other Discourses center on job security and displacement (Hilstob & Massie, 2022), as AI makes it easy to track and rank employee activities, performance data, work habits, and communication patterns (Leonardi & Treem, 2020). This sets the stage for predictive analytics, where AI algorithms infer future behaviors based on past actions that can then become the basis for dismissal. Workers and unions thus express concerns that automation leads to job loss and increased economic inequality (Nissim & Simon, 2021). This perspective emphasizes the material consequences of automation, such as layoffs and wage reductions, and calls for policies that protect workers' rights and ensure equitable distribution of the benefits of technological advancements.

Overall, the existing literature highlights key takeaways, including the role of technology to both empower and undermine labor unions, depending on how it is leveraged. Unions can utilize digital tools for organizing, communication, and advocacy, but must also navigate the risks of surveillance and automation that threaten job security. As such, there appear to be unique challenges and opportunities for workers and unions, shaping an ever-changing landscape of control, power, and union resistance in the workplace.

Discussion

This paper began with an interest in investigating the discourse-materiality relationship in union leadership research. The union context is especially important because an overemphasis on the discursive aspects glosses the materialities of why unions exist in the first place, which is to secure economic justice and safe working conditions. Thus, for RQ1 we were keen to know if and how economic and other materialities surfaced in the literature on union leadership communication and discourse. Across social science journals in communication, management, psychology, economics, and sociology, we found some 33 papers with an explicit communication and/or d/Discourse focus, as Table 1 shows. A thematic analysis found three materialities consistently linked to union leadership discourse: economics, bodies, and technology, from which we note the morphing of the discourse-material relationship.

For example, we show how *economic issues* are difficult to explain in communicative terms (Mumby, 2018), much as we saw with the negotiation studies and, overall, the relative lack of attention to economic outcomes (except by way of general reference) throughout in Table 1. Although it would be highly labor intensive, the combined use of negotiation transcripts, interviews with the parties before and after settlements, union and company archival documents, and current data in public sphere[1] appears minimally necessary to understand how discourse and wage increases come together. Even then, the animated energy of negotiations from which leadership may be occasioned (or not) or the give-and-take breathing of the bargaining process that leads to settlements is often off-limits to researchers who will be forced to rely on secondary accounts.

Compounding this neglect is that unions have largely lost the value proposition linked to contributions to capital accumulation. As Mumby (2018) argued, industrial capitalism under Fordism created economic value by managing the indeterminacy of labor in the production process in order to realize surplus value. Under neoliberal capitalism, managing the indeterminacy

[1] For example, United Auto Workers used 2023 data on CEO compensation packages showing their CEO makes 362 times the median UAW worker (Kaye & Hsu, 2023).

of meaning inherent in the brand creates surplus value. To wit, the core mission for corporations shifted away from the manufacturing process towards the management of image, meaning, and identity (p. 104). While one might argue that it was certainly no picnic for unions under industrial capitalism, they have been left out of the conversation entirely with neoliberalism, which may partly explain their rapid decline in this period (Hyde et al., 2017). Thus, the discourse--economic challenge for unions remains.

For *gendered and raced bodies*, Table 1 reflects what Ford et al. (2017, p. 1554) call an "ontology of absence" with respect to bodily presence, body language, body work, and embodied knowledge, reflecting only a minimal engagement with the discourse-material relationship on this score (e.g., Lundemark, 2021). Much is to be gained by attending to the small but growing leadership literature on embodiment, corporeality, and materiality (Fairhurst, 2007; Fairhurst & Cooren, 2009; Hansen et al., 2007, Pullen & Vacchani, 2013; Sinclair, 2005, 2013), especially vis-à-vis issues of gender and race.

Additionally, sexism and racism produce particular challenges for union leadership in development opportunities, differential treatment (e.g., wage discrimination) (Twarog et al. 2016), and unseen structural influences that promote stereotyping when the ratio of minority to majority members reaches token status. As Kanter's (1977) early research on female managers demonstrated, high visibility due to token status leads to performance pressure, social isolation, role entrapment. But Table 1 also tells a more positive story, such as when Mother Jones adopted a 'militant motherhood' style to embrace rather than choose between two seeming opposite gender roles (Tonn, 1996). Foerster's (2004) study of a Black led union likewise shows a similar level of inventiveness when leaders espoused a 'panethnic black identity' to be inclusive of rather than differentiate immigrant populations. Although not undertaken with union members, research on executive Black women shows them embracing the overt *and* covert social dynamics of their raced/gendered bodies by becoming wise to the strategic opportunities of knowing when to time their visibility and invisibility (Smith et al., 2019). Amidst the negative effects, there are glimmers of hope for discourse-gender/raced bodies in union contexts, especially when opposites are recast as complementarities.

For *technology*, we are at the precipice of understanding the hybrid agencies of technology and humans and what they portend for the simultaneity of union empowerment and subjugation (Treem & Leonardi, 2013). If they can be mastered, social media are powerful organizing and democratizing tools for labor movements (Carneiro & Costa, 2022; Panagiotopoulos & Barnett, 2015). At the same time, the surveillance they invite is a difficult hurdle, as is the rapidly changing nature of all technologies witness the AI revolution whose projected effects are incredible and concerning in equal measure. The discourse-technology relationship is on a continuous rise in union contexts.

For RQ2, we sought to understand what the above findings mean for the study of discursive leadership. This is especially important because, contrary to the research we reviewed, a strong argument to be made is that discourse and materiality should not be bifurcated and viewed as independent forces joining together (Mumby, 2018). They are co-configuring, with one indeterminately informing the other (Orlikowski, 2007). The value proposition of unions, generally, and union leadership's of the rank-and-file, specifically, is inextricably linked to economic gain (or lack thereof). But it is also tied to an agreed-upon economic system with biases against raced and/or gendered bodies, not to mention rapidly changing technologies whose material affordances impact power, politics, and the meaning of work.

What, then, of the term 'discursive leadership'? Should we be embracing new materialist terminology, something akin to 'sociomaterial leadership' or more than human 'assemblages' (Kuhn, 2024; Kuhn & Simpson, 2020)? It is a difficult question to answer, especially for a journal entitled, *Discourses on Culture*. On the one hand, the union context underscores the criticality of the discourse-materiality relationship – especially when, Cloud (2005) argued, extant research has yet to show how labor-management negotiations (or other discursive forms) specifically link to economic outcomes, the *raison d'etre* of unions. Materialities cannot be ignored. On the other hand, neither actor nor analyst can communicate without language (little 'd' discourse) and broader systems of thought, speech, and action (big 'D' Discourse), simultaneously shaping and being shaped by a material world. As Foucault (1975) argued, it is

nigh impossible to communicate without d/Discourse; one merely jumps from one discursive network to another. Discourse, too, is *sine qua non*.

Perhaps Karen Barad (1998, 2003, 2007) is right to argue that nothing in the world is inherently separate from anything else; relationalities are all that matter. However, this would require a shift away from 'discursive leadership' to the 'discursive-material *practices* that produce leadership.' It is a radical shift away from pre-existing substances like individual leaders or discursive forms like narratives coming together to produce a practice (Kuhn & Simpson, 2020). Instead, the practice is generative of the participants through what Barad (2007) calls 'agential cuts.' Analysts can only say leadership is relevant in a given practice when it is made to matter in practice i.e., when that practice centers leadership as a concern (Kuhn & Simpson, 2020). Mother Jones, therefore, is a product of juxtaposed practices of consistently referring to union members as 'her boys' and continually agitating on behalf of the United Mine Workers. Leadership is a performative vis-à-vis the ongoing, if fleeting, nature of discourses, material affordances, and actions and interactions.[2]

Discourse is decidedly decentered in a new materialist view, thus rendering the term 'discursive leadership' obsolete at best. However, there are other forms of materialism (e.g., historical materialism) that neither reject new materialist insights nor decenter discourse and human agency. Cloud (2024) asserts that "new materialism collapses the material/discourse dialectic into one analytic category, flattening the dialectic and making it difficult to evaluate discourse by a materialist standard, since the discourse is always-already material." As such, new materialism fails to explain the materialities of violence against women,

[2] For this reason, researchers, not just actors, must configure *themselves* as part of a sensing, legitimizing, and measurement 'apparatus' parsing phenomena into the seen and unseen based on habits of culture, thought, and speech. Barad's (2007) 'agential cuts' suggests that 'discursive leadership,' 'sociomaterial leadership,' 'assemblages,' or even 'leadership psychology' are but 'cuts' made through the scientific research apparatus. Each are phenomena realized through cuts that render knowable the relationship between measures of collective action practices and the 'leadership' outcome(s) engendered, including 'think leader, think (white, Western) male.' What this radically performative view of organizational life means for the study of leadership, generally, and union leadership, specifically, certainly invites more exploration.

whether physical or economic, by its disavowal of human agency (Lozano, 2019). Lozano and others (e.g., Allhutter et al., 2020; Cloud, 2024) thus look to a multi-theoretic lens to acknowledge new materialist insights while maintaining the discourse-materiality dialectic for more efficacious critiques of structures of domination and transformative change. Discursive leadership, by implication, would live on.

Finally, as RQ3 queried, what do our findings suggest for the study of union leadership? We believe the union context is not just useful for studying the discourse-material relationship, it is *necessary* for the continued democratization of the workplace for the rights of workers (Feurer, 2022). Unions have achieved historic gains in wages, benefits, safety, job protections, and voice. They are an important counterweight to unrestrained capitalism (Feurer, 2022), as union workers have higher wages and better benefits than the underrepresented (Burgoon et al., 2010; Kerrissey & Meyers, 2022). They are also a counterweight to union leadership that colludes with management against the interests of workers, in turn, spurring dissident union leadership (Cloud, 2011). Studying the union context is also necessary for reasons of diversity, equity, and inclusion, especially as women, Blacks, Latinos, and immigrants become the faces of union membership yet remain underrepresented in union leadership (Twarog et al., 2016). Finally, we must understand better how the rights of workers may simultaneously be enabled and usurped by new technologies in the workplace, creating complex power dynamics neither easily apprehended nor resisted.

Directions for future research

Resistance to management overreach is sine qua non to democratic organizational values, and sound leadership is necessary to effectively challenging the status quo. However, as Kaminski (2023) argued – and as we have seen in this paper – there is a dearth of journal research on union leadership despite a vast literature on leadership in business and educational environments. While traditional survey research on union leader transformational leadership styles predictively

encourages leaders to create an appealing vision and inspire workers to form collective goals (Cregan et al., 2009; Kaminski, 2023; Twigg et al., 2007; Cregan et al., 2009), direct links between style and material substance remain a mystery. The literature on organizational resistance, more generally, is heavily discursive (e.g., Fleming & Sewell, 2002; Zoller & Fairhurst, 2007). However, suggestions by others to focus on massing (e.g., of bodies) (Scott, 1990), the economic force of strikes (Cheney & Cloud, 2006), and technology-base forums (e.g., websites, chat rooms, newsletters) not subject to management control (Ainsworth et al., 2005; Real & Putnam, 2005) are steps in the right direction for unpacking the discourse--material relationship in union contexts.

The lack of union leadership research also explains why there is so little journal-based research on leading in cultural contexts, including nations and cultural groups, for whom the discourse-materiality relationship almost assuredly would vary. However, studies like the aforementioned Lundemark (2021) and Kirton and Healy (2012) might also give greater weight to the intersectionality of bodies, economic outcomes, and technology uses. It could also be that this work is better suited to presentation in books, which was not a particular emphasis in this paper.

Finally, under neoliberal capitalism, it appears that union leadership must embrace union branding, which involves constructing and communicating a union's identity, mission, and values (Mumby, 2016, 2018; Kuhn et al., 2017, p. 103) and has significant implications for member recruitment, retention, and overall influence (Alvesson & Willmott, 2002). The interplay between the discursive practices that shape a union's brand and the material conditions (e.g., economic realities, labor market dynamics) that influence these practices is not yet fully understood (Kuhn et al., 2017). Future studies should explore how unions can effectively use discourse-material relationships to craft brands that resonate with diverse membership bases while also aligning with the material needs and expectations of these groups. Additionally, research could investigate how branding strategies impact the public perception of unions and their ability to mobilize support in an increasingly digital and fragmented media landscape (Mumby, 2016, 2018).

Conclusion

This paper peered into the nuanced relationship between discourse and materiality within union leadership research. While we are concerned with a lack of union leadership research overall, there is a strong tendency to favor the discursive and gloss economic and other material concerns, the *raison d'etre* of unions. Through an exploration of how such material themes as economics, bodies, and technology appear in this literature, we see many further opportunities to unpack the discourse-materiality relationship. We also believe that doing so is necessary for the ongoing survival of unions, which must adapt to the ongoing challenges of shifting social, technological, and economic landscapes.

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Table 1. Studies of Union Leadership Communication

Author	Summary	Data Forms	Leadership/ Followership
Landsberger, 1955	Mediation cases of labor mediators, employers, and union officials. Successful mediation characterized by a structured communication flow.	Naturalistic transcripts of 12 mediation cases.	Leadership implications for fostering positive interaction, emotion management, and recognizing negotiation phases.
Douglas, 1957	Negotiating and settling differences without resorting to strikes through government mediation. Bargaining as a strategic resource to magnify conflicts.	Uncoded union bargaining transcripts.	Company leaders should not equate 'deal-making' with bargaining, which involves opportunities (phases and tactics) to avoid strikes.
Bednar & Curington, 1983	Navigating power dynamics and informational asymmetries in bargaining processes. Emphasis on balancing the assertive and cooperative.	Coded transcript of labor--management wage negotiations.	Negotiators from either side must use relational messages to manage power relations and command respect while content must be strategically stable to maintain credibility and consistency.
Donohue, Diez, & Hamilton, 1984	Union negotiations require the ability to respond to prior utterances and cue subsequent ones. Naturalistic data is superior to bargaining simulations.	Coded transcript of actual and simulated union negotiations.	Unions and management often employ professional bargaining agents who may not be the actual leaders of either side.
Putnam, Wilson & Turner, 1990	Argument in policy deliberations on teachers' and administrators' argument types.	Arguments (reason-giving, defining issues) in negotiation.	School Board administrators and (elected) teachers specialize in argument types during bargaining.
Putnam, Van Hoeven, & Bullis, 1991	Fantasy themes and bargaining rights of two teachers' negotiation units in two school districts.	Multi-method including observations, interviews, field notes, documents, surveys.	Administrators and teachers hold similar meanings for common enemies and past negotiations, but they diverge in meanings for the bargaining rite.

Putnam, 1994	Bargaining serves crucial communication functions (signal problems, clarify misunderstandings, inform). Ritualized conflict management facilitates organizational adaptation, growth, and stability by balancing power relations.	Multi-method including interviews, observation.	Union leaders must engage in clear and constructive communication with their own members to bridge gaps with management.
Gangemi & Torres, 1996	Campaign tactics and strategies employed by the United Auto Workers (UAW) during Caterpillar campaign. Disseminating propaganda played a pivotal role in rallying support and justifying their actions.	UAW texts, journalistic reporting.	Outside UAW leadership trained local union leaders in tactics, work-to-rule, and encouraging resistance against the company.
Tonn, 1996	Historical case study of Mary Harris "Mother" Jones, a prominent union leader with effective agitation strategies, intertwining motherhood with militancy.	Rhetorical analysis of narratives and argument forms, familial terms of address, ad hominem attacks, and voicing characters in speech.	By embracing contrasting gender roles, Jones fostered a collective identity and overcame gender resistance within the union movement.
Osborn & Bakke, 1998	Memphis sanitation workers' strike, its use of melodramatic rhetoric, and impact on community dynamics.	Rhetorical textual analyses, observations of the strike as melodrama (narrative).	Underscores need for union leaders to be represented positively in media narratives. Melodramatic rhetoric can divide, impede negotiations
Franzway, 2000	Union women who navigate family demands and union life, with complex negotiations between gendered discourses and union practices.	Interviews with union women in South Australia.	Feminist discourses enable women to resist traditional union norms (of white male leaders) and create political opportunities even amidst work-family tensions.

Putnam, 2004	Use of rhetorical tropes, metonymy and synecdoche (strategic use of ambiguity), tacit norms, and bargaining formulas in union negotiations.	Metonymy, synecdoche in actual union negotiations and interviews.	Confronting tensions between language-money, controlling-yielding, and independence-interdependence, enables bargainers to develop formulae for settlements and employ flexibility in making sense of ambiguities and uncertainties in negotiations.
Brimeyer, Eaker, & Clair, 2004	Rhetorical strategies in union organizing campaigns by organizers and management.	Union and management texts, rhetorical analyses.	Leadership through strategic rhetoric to instill confidence, unity, and a sense of moral justice among workers
Foerster, 2004	Challenges and strategies in fostering unity among a diverse union membership. Shared identity ('panethnic black identity') based in pride builds solidarity and more easily accommodates immigrant groups.	Ethnography, interviews.	Leaders must encourage members' common struggles and form alliances against common oppressors.
Brennen, 2005	Historical case study of Los Angeles Herald newspaper strike 1967–77 and portrayal of unions in local and national media.	Media framing, word choice, negative consequences (biased against labor) e.g., "scabs" as messaging by management to avoid collective bargaining.	Management's refusal to negotiate reinforced the collective identity of union members. Publisher was lionized in the press for his leadership.
Cloud, 2005	Manufacturing setting of a losing union campaign at Staley shows the limits of discourse relative to material gains and losses, company coercion.	Narratives and the role of victim metaphors in union newsletters seen through dialectical materialism.	Rank-and-file as newsletter writers had low power due to few material gains.

Real & Putnam, 2005	Historical tensions between professionalism and unionism, especially within elite professions like pilots.	Tensions, military metaphors, and ironies in central themes of newsletters, websites, news reports.	Resistance leadership from within the pilots' union and why unions are also bureaucracies to be resisted. Leadership is dispersed vis-a-vis dissidents.
Cranford, 2007	Union renewal efforts of Latina/Latino immigrant union ('Justice 4 Janitors') weakened traditional gender divisions and fostered feminist leadership values.	Ethnography, interviews, observation.	Union focus on leadership development enables women to challenge gender equalities, have leadership roles, and personal and political empowerment.
Ganz, 2009	Case study of Cesar Chavez and the United Farm Workers in the 1960s. Chavez's charisma and moral authority organized farm workers to achieve victories against powerful agricultural interests.	Historical accounts, texts.	Chavez's leadership combined strategic insight, charismatic appeal, and a commitment to nonviolent action.
Banks, 2010	Writers' Guild of America mobilization of A-list writers to join negotiation committees and picket lines as a pressuring tactic.	Interview accounts.	Leadership drew on what writers do well regarding digital media and images to challenge traditional media relations tactics.
Burgoon, Fine, Jacoby, & Tichenor, 2010	American unionism and immigration discussion, challenging that unions are universally opposed to immigration and revealing a deep divide within the labor movement.	Historical narratives.	Union leaders' public stance on immigrants' shown helping or hurting the cause of labor.
Cloud, 2011	Informal leadership by dissident union members, pushing back against both Boeing and union bureaucracy in the 1995 machinists' strike.	Narratives, archival quotes.	Rank-and -file members fight for democracy over their union leadership's complicity with Boeing.

Artz, 2012	Relationship between leadership styles and organizational resilience in US and European corporations in the post-financial crisis period of 2008.	Case studies, interviews, financial reports.	Adaptive leadership in crisis management is characterized by flexibility, strategic thinking, and willingness to engage employees at all levels.
Bryant-Anderson & Roby, 2012	Impact of gender and race on union stewards involving discrimination and tokenism; the way marginalization positions leaders to better achieve racial and gender justice.	Broad thematic analysis of interviews based on frequencies.	Women stewards emphasized care for members while white men adopted a direct, assertive style. Women stewards of color reported styles that were strong, direct, and uncompromising.
Kirton & Healy, 2012	How gender, race, and class influence women's union discourses; tensions between masculine leadership models and feminist ideals; how women leaders navigate these complexities.	Women's discursive framing of leadership in interviews.	Women leaders' emphasis on inclusive, transformational leadership addressing gender and racial inequalities. American women were more individualistic, while British women were more collectivistic.
Fiorito, Padavic, & Russell, 2014	Role of union leadership in fostering member enrollment, engagement, and solidarity.	Surveys, interviews, case studies.	Union leaders' are linchpins in mobilizing members and fostering participation.
Rubio, 2016	Historical case study of 1970 U.S. Postal strike. Explores the communication strategies used by union leaders and members during the strike.	Historical documents, transcripts, interviews.	Sustaining a strike and reaching settlements depend on leaders' ability to articulate demands and maintain strong lines of communication.
Twarog, Sherer, O'Farrell, & Coney, 2016	Union leadership development programs and their effectiveness in enhancing leadership skills.	Program evaluations, participant surveys, interviews.	Leadership development programs are essential for union members, especially women leaders.

Lundstrom, 2017	Contrasts two leaders with different styles that influence team dynamics and organizational performance.	Case studies, interviews, organizational records.	A participative approach led to higher engagement and morale, while an authoritative style resulted in efficiency but lower team satisfaction.
Phillips et al., 2019	History of librarian union at UC Berkley and its involvement in cultural changes within the organization.	Discourses of neoliberalism, social justice/ democracy, anti-unionism.	Targets 'one-party' oligarchy of unions in favor of democratic/ social movement leadership i.e., informal, collective leadership
Krantz & Fritzén, 2021	Swedish teacher's union and the tensions with collective identities.	Compared texts vs. discursive practices vs. social practices.	Leadership implications for collective identity and responding to external forces that create identity contradictions and inconsistencies.
Lundemark, 2021	Union officials' construction of migrant workers in two Danish trade unions vis-à-vis class and trade union practice was bound up with union officials' discursive constructions of nation, ethnicity, and race.	Ethnography, interviews, Discourses of race, nationality, and gender.	Leadership implications for migrant workers and the role of discursive and nondiscursive elements in addressing the tension between inclusion and exclusion.
Crocco & Jordana, 2023	Tracks the evolution of union leadership in Chile across different generations, highlighting the impact of changing regulatory frameworks.	Interview accounts.	Communication gap between established union leaders and young members just starting out as leaders. Encouragement from senior leaders increases member participation.

Source: own elaboration.

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Piotr Cap

Department of Pragmatics

University of Łódź, Poland

piotr.cap@uni.lodz.pl

ORCID ID: 0000-0002-7685-4112

Faces of Populism in the Rhetoric of Leadership: How Conflict Talk Wears Out

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Abstract: The present paper employs conceptual tools of critical cognitive discourse studies (discourse space research, metaphor analysis, proximization) to explore patterns of legitimization discourse used by top Polish political

parties to claim state leadership in the years 2015–2023. The first part studies the discourse of Law & Justice, a far-right conservative party ruling Poland from October 2015 to October 2023. It describes L&J's strategies of leadership legitimization involving socio-ideological polarization, strategic generation of internal as well as external conflict, threat construction and crisis management. The second part analyzes the more moderate and cooperation oriented discourse strategies implemented by three opposition parties in the lead-up to the 2023 parliamentary elections, in which L&J finally lost power. The aim of the paper is to compare and contrast the two discourses, L&J's and the opposition's, to speculate about the longevity of radical populist discourses such as L&J's. It is argued that a conflict-charged, polarized populist discourse can be an extremely powerful tool, able to grant long-term political leadership. At the same time, in a yet longer perspective, such a discourse runs a considerable risk of 'wearing out' and becoming vulnerable to more forward-looking and pragmatic leadership rhetoric, which presages political change.

Keywords: leadership discourse, discursive legitimization, populist style, threat construction, conflict and crisis

Introduction: context, rationale and goals

The years 2015–2023 have been a turbulent period in Poland, defined by political and social unrest of a caliber unseen in the country since perhaps as long ago as its return to democracy back in 1989. It has seen momentous political events, mind-boggling legislative changes and radical executive policies, notoriously arising legal crises, social conflicts, manifestations of public dissent, as well as countless other socio-political bumps, twists and turns in virtually all areas and at all levels of the Polish political and social life. The October 2015 parliamentary elections brought a landslide victory of the far-right, ultra--conservative Law & Justice (L&J) party, which took over the legislative and executive powers after the eight-year rule of the Civic Platform (CP)'s liberal government. The resulting policy changes were enormous, including a fast

growth of state interventionism and central economic planning, constraints on the constitutionally sanctioned freedom and independence of the judiciary, as well as state control over the public media, among many others. Equally radical and consequential were L&J's changes in Poland's foreign policy, reflecting an essentially Eurosceptic disposition of the new government. The years 2015–2023 reveal a difficult history of conflicts between Warsaw and Brussels, symbolized by EU's activation, in November 2017, of Article 7 of the European Union treaty, in response to the democratic backsliding of state institutions in Poland[1]. Indeed, since its coming to power in the fall of 2015 the L&J government set as one of its main goals defining anew Poland's position with respect to different critical issues surrounding Europe and the EU, such as the Eurozone crisis, populist movements, Brexit, climate change, or the migration crisis. In line with this goal, one of the L&J's first decisions was, for example, to refuse to honor the EU refugee relocation agenda agreed on by the former CP government, on the grounds of its 'realizing a German plan' at the expense of Poland's national interests (cf. Cap, 2022).

To communicate their policies to the people, L&J leaders developed their own kind of populist style, merging the standard populist discourse strategies (anti-elitism, strong ideological polarization, de-legitimization of political opponents, etc; cf. Norris & Inglehart, 2018) with some new and typically more coercive strategies. Such strategies involved the construction of L&J adversaries, both home and abroad, as enemies rather than rivals, and thus the conceptualization of the arising conflict as a source of clear and gathering threat. Positioning themselves as staunch opponents of 'unpatriotic elites' and cosmopolitan liberalism together with its globalist economic policies, L&J politicians claimed to remain on guard of the 'ordinary people,' their national identity and Christian traditions. The use of an existing ideological conflict in the service of political legitimization was thus an important feature of L&J's

[1] The Article (Article 7 of the Treaty on European Union) involves a procedure under which membership rights of a state can be suspended, as punishment for breaching EU's founding values, which include, among others, a consistent commitment to the rule of law.

policy and L&J's discourse, though still not the most distinctive one. The genuine uniqueness of Law & Justice's leadership style was its essentially *strategic*, not to say ostentatious character of conflict construction and crisis management. Unlike in Hungary, Italy, Romania, Bulgaria, and other countries where social or political crises were exploited in recent years by certain groups and parties to further their political goals (cf. e.g. Schmölz, 2019), Law & Justice made conflict and crisis, intentionally, an integral part of political agenda and policymaking (Cap, 2022). This can be best seen from the very number of conflict domains in which the L&J government was involved (both locally and internationally) in the past couple of years and which I look at more closely later in this article. Undoubtedly, the coercive powers of L&J's discourse should never be underestimated, given the success of the party not only in the 2015 elections but also four years later. Despite the first signs of recession and dwindling economic figures, the year 2019 saw another convincing parliamentary win of the party, which only endorsed and cemented the hitherto developed discourse strategies.

The outbreak of the Covid-19 pandemic and, later, Russia's invasion on Ukraine saw Jarosław Kaczyński's[2] party initially in a good shape and it was not until mid-2022 that opinion polls started to indicate a decline in the support for the L&J government. The moment the decline began, the trend being particularly salient among the party's 2015/2019 voters, was found by many just as surprising as inexplicable. The majority of experts, including top Polish sociologists, social psychologists, and other researchers and media commentators, maintained it was completely inconsistent with the established, broadly recognized rules of people's behavior in periods of national (or global) crisis. It is generally held that in difficult, turbulent times, characterized by the presence of concrete geopolitical, environmental, military or other threats, people tend to follow their current leaders, rather than looking for political alternatives (Ansell et al., 2014). Apparently, however, neither the long period of the pandemic nor the ongoing warfare behind Poland's eastern border were able to provide conditions upholding the support for L&J's leadership. Thus, between July

[2] The Chairman of Law & Justice, since 2003.

2022 and March 2023 the party suffered a painful 10% drop in the polls, making the results of the upcoming elections increasingly hard to predict (even if L&J was still considered a favorite). And indeed, as the trend continued, on October 15, 2023 Law & Justice lost both the Parliament's lower house, the Sejm, and the Senate to the opposition, a self-proclaimed 'coalition for democracy'[3], comprising the Civic Platform (CP), Third Way (TW), and The Left (L). Having achieved a combined Sejm vote of 54%, the three parties managed to form a coalition government, sworn by the President in December 2023. Notably, in the lead-up to the elections, the main opposition force, Civic Platform, was led by Donald Tusk, Poland's former Prime Minister (between 2007–2014) and president of the European Council from 2014 till 2019. When the CP-TW-L coalition was formed after the elections, Donald Tusk re-assumed his PM position in the new government.

Though less than a year passed since the 2023 elections[4], their relatively unexpected result has been subject to multiple analyses, discussions and speculations, in Poland as well as abroad (see e.g. Gardulska, 2024 for an overview of opinions). In general, L&J's loss of power tends to be attributed to a mix of economic and socio-political reasons, such as the record-high inflation rate (highest in the EU in 2022), growing tax burdens for small entrepreneurs, irresponsible investment policy generating massive losses of public funds, increasingly inefficient health service and, on the European front, the government's inability to normalize the strained relations with EU institutions at Brussels. This list could readily be lengthened by adding some more direct factors of high social sensitivity and popular appeal, such as the crawling ideologization of public life, increasingly restrictive abortion laws, politicization of the system of school education, and others. Not least, particularly the second term of L&J's rule showed the involvement of numerous party members (and their families) in different economic scandals and acts of corruption (at local as well as state levels), thus undermining the founding

3 An informal name, carrying no institutional meaning in the election campaign.

4 This paper is being written in July 2024.

promise of the L&J government to stand by 'the ordinary Poles' (Wylęgalski, 2019; Cap, 2022).

While not detracting from a crucial role that these factors played in the outcome of the 2023 elections, I believe that the change that happened in Poland last fall – and the reasons therefore – must also be considered from a discourse analytical perspective. As has been noted, L&J party leaders fully appreciated the power of discourse and political communication (as well as political propaganda) in earning and maintaining people's support for policies introduced by their government, both home and abroad. It is even believed (e.g. Gardulska, 2024) that it was only L&J's massive propaganda, circulated round-the-clock by the state-controlled media, that made it possible for the party and the government to remain in power for as long as eight years – two full parliamentary terms. Given the strength and consistency of L&J's leadership discourse, its nature being essentially threat-based and coercive, one might wonder how that discourse was countered by the Civic Platform, Third Way and The Left parties in the 2023 election campaign. The aim of this article is therefore to compare the key discourse and rhetorical strategies used by the L&J government in different policy domains in the years 2015–2023, against the main strategies implemented by the three opposition parties in the lead-up to the 2023 elections. This means looking for new effective rhetorical ploys developed by the CP, TW and L leaders, as well as identifying any weaknesses emerging over time in L&J's discourse that could be (and indeed were) used as main targets in the campaign.

The article is organized as follows. The brief section 2 describes the data, theoretical framework and methodology used in the study, focusing on the processes of ideological polarization, coercion, and threat construction, their conceptual representation in discourse space and their manifestation (i.e., lexicalizations) in actual language and text. Section 3 defines the principal strategies of L&J's leadership and policy legitimization rhetoric, outlining their functions across different (geo)political, social, and discourse domains. Section 4 investigates the most salient features of the opposition's 2023 election discourse, focusing on the strategies designed to counter and delegitimize both the L&J's policy and their leadership rhetoric. The concluding section 5 sums up and

assesses the main findings, postulating further research in the populist discourse that extends over time, thus running the risk of 'wearing out' and becoming less and less appealing to its principal audience.

Data, theory and methods

The study conducted in the present paper is essentially qualitative and uses two distinct text selections featuring speeches, interviews and comments made by top Polish politicians. The first selection contains texts of 100 speeches, etc., by the most prominent of the L&J party and government officials, such as the L&J chairman Jarosław Kaczyński and the Prime Minister Mateusz Morawiecki[5]. The texts cover the entire eight-year period of L&J's uninterrupted rule of Poland following the party's coming to power in the 2015 elections. This selection is used mostly in section 3 of the paper. The other selection comprises rally speeches delivered by leaders of the opposition parties – the 'coalition for democracy' – in the course of the 2023 election campaign. Containing 50 addresses, by such politicians as Donald Tusk (later to become the Prime Minister) and Szymon Hołownia (later the Sejm Speaker), it spans the period from the beginning of 2023 till the very election time in October that year. I engage with this selection in section 4. Though obviously not covering all public performances by members of the two political camps in the respective timeframes, the texts grouped in the two selections paint a fair, representative image of the conceptual, rhetorical and pragmalinguistic features of the main discourses and discourse strategies on both sides of the barricade.

Given the focus of the analysis on issues of ideological polarization, social coercion, indexing political distance, conflict construction and threat generation, the above data are approached within the framework of cognitive critical discourse studies (CCDS) (see Chilton, 2004, 2014; Hart, 2010, 2014; Cap, 2013, 2017, 2022; Musolff, 2016; etc.). As has been documented in multiple critical studies

5 PM between 2017 and 2023.

in different discourse domains (see Hart, 2018, and Cap, 2022 for discussions), CCDS offers a disciplined theoretical view of the conceptual import of pragmatic and linguistic choices identified as potentially ideological. Incorporating vast amounts of research in spatial cognition and conceptualization (e.g. Fauconnier & Turner, 2002; Evans & Chilton, 2010) into interdisciplinary studies of pragmatically motivated construals of meaning, it affords an excellent lens on the many persuasive, manipulative, and coercive properties of discourse. Crucially, it offers workable conceptual apparatus and tools to account, through a text-based analysis, for ways in which conflict and crisis are constructed (and often perpetuated) discursively in the service of different goals sought by political leaders.

This paper employs analytical concepts and methods proposed by three popular models in the contemporary CCDS, namely Discourse Space Theory (DST; Chilton, 2004, 2010, 2011, 2014), Political Metaphor (Musolff, 2016, 2021), and Proximization Theory (Cap, 2013, 2017, 2022). The input of DST is conceptually primary and thus DST tools make for the leading approach in the analysis. DST assumes that in performing any discourse people open up a particular kind of mental space in which the 'world' (social, political, etc.) described in the discourse is conceptually represented. In political communication, this space holds the leader and his ideological and political supporters and allies (a symbolic 'US'), as well as the adversary, or antagonist (a symbolic 'THEM'), 'located' at a relative distance from the US camp. The location of the US and THEM camps, and the distance that extends between them, are symbolically represented through discourse – the specific lexical and grammatical choices made by the speaker. Drawing upon this default arrangement, Proximization Theory works mostly with the concept of distance, showing that strategically enforced changes in the construal of distance along the close-remote axis, are instrumental in threat and fear generation. In their performance of proximization, political speakers use lexical and textual means to present the THEM entities (physically distant social groups, events, states of affairs, and 'distant,' i.e. adversarial, ideologies) as getting increasingly closer and eventually threatening to entities located in the US camp. As a forced construal operation, proximization demonstrates substantial coercive powers that can be applied in the service of

central leadership goals, such as legitimization of policies proposed to the people to protect them against the impending threat (this mechanism will be analyzed in detail in section 3 devoted to the L&J leadership discourse).

Finally, the input of the Political Metaphor model consists, mainly, in its approach to political discourse from the CMT[6] perspective of conceptual scenarios. Conceptual scenarios are understood as conventionalized and largely automatic patterns of understanding based upon embodied experience (Musolff, 2016, 2021). As such, they endorse apparently self-evident default conclusions and further some 'natural' and 'obvious' behaviors, actions, or solutions. The ability to force simplistic patterns of reasoning with regard to all kinds of social and political issues provides political master scenarios (such as PROBLEM IS ENEMY or POLITICAL CONFLICT IS WAR) with a great propagandistic value. In addition, being rhetorically attractive, conceptual scenarios make a direct emotional appeal and are thus readily shareable (Ridolfo & De Voss, 2009; Oddo, 2018), that is easily remembered and recirculated. The latter property matters obviously a lot in public discourse domains such as campaign discourse (see section 4). Overall, the interest of Political Metaphor in the inherent pragmatic force and a broad social appeal of conceptual scenarios in political discourse complements the DST and Proximization frameworks in their focus on conflict, discursive coercion and legitimization of political leadership.

The L&J discourse in 2015–2023: conflict construction and crisis management

The leadership rhetoric of Law & Justice in the years 2015–2023 is a genuinely exceptional example of modern European far-right discourse (cf. Cap, 2022). It involves a consistent use of an unprecedented variety of strategies of socio-ideological polarization, conflict construction, threat generation, and crisis management, extending over a great number of domains, from international

[6] Conceptual Metaphor Theory (Lakoff & Johnson, 1980; Johnson, 1987; etc.).

relations to local matters of healthcare or education, among others. Crucially, it does not merely respond to objectively occurring crisis situations but is used to provoke or create these situations itself, to pave the way for ready-made 'solution policies' meant to enact and strengthen the Party leadership. The analysis below focuses first on home issues – 'decommunization,' ideological conflict, historical divisions, economic inequalities, social exclusion – emerging in national/local discourse domains such as parliamentary sessions and media interviews concerning the internal situation and policies. Afterwards, I move to the L&J discourse of foreign affairs – mainly the stance toward the European Union.

Home issues: 'post-communist elites' and 'the worst sort of Poles'

Particularly in the first term (2015–2019), the bulk of Law & Justice's home--front discourse targets the party's parliamentary opponents, focusing on ideological background and differences, and making use of pragmatic distancing strategies to situate the opposition, in conceptual terms, at the remotest end of the US/THEM spectrum. Most typically, it conflates the liberal majority of the opposition and their followers with post-communist groups and ex--leaders of the country (referred to as 'post-communist elites'), by presenting L&J's opponents as 'keepers of the Round Table order.'[7] That way, it construes the opposition as unfaithful to 'core values' and 'vital interests' of the Polish people. The result is the strengthening of a bipolar identity framework (Van Dijk, 1998) and an othering arrangement whereby the opposition is perceived as a symbolic THEM entity threatening the well-being of the US camp ('real Poles') under L&J's leadership. This firm conceptual arrangement involves, in discursive terms, a whole spectrum of judgments and negative images, such as selling Polish property to foreign investors by the former liberal government,

[7] The 'Round Table order' ["układ Okrągłego Stołu"] refers to the political result of negotiations that took place in Poland between the ruling communist party and the opposition in February – April 1989. The talks were a key element in the collapse of the communist regime and a smooth transition to democracy. The Law & Justice party has always been very critical of the talks, calling them 'a deal' with communists.

inability to handle unemployment and economic migration from Poland, promoting multiculturalism at the expense of the Polish cultural and religious heritage, incorporating non-Polish liberal values into family life, and many others. In L&J's post-2015 discourse, reasons for the above invariably intertwine with the existing ideological conflict between a 'patriotic mindset' (such as L&J's) and the antagonistic 'post-communist mindset' (the stance of liberal groups and parties such as the Civic Platform), whose origins go back to the 1989 transformation. In L&J's argument, the current opposition, comprising mostly members of the former CP cabinet and the party officials, are presented as direct heirs and main beneficiaries of the Round Table compromise:

1) If you look at the past 8 years, and in fact the past 27 years we had to deal with the overwhelming predominance of one group. In the area of ownership, media, and also in the public life for the vast majority of the time, in these 27 years. The establishment in this country said that everything was OK. But everything was not OK. Conditions to develop the rule of law arose only today, as we are able to rebuild it, or actually create it, because in Poland for a very long time there was no right balance. The elites of the old communist regime switched into the new system, maintaining their advantage, and exchanging power for property. The prevalence of that group continues to be felt in the realm of the mass media, in the economy, and in various state institutions like the judiciary, which was so favorable to the previous government. And this is what we want to fix, to change, step by step. We must try to consolidate Polish society at large along the lines of positive Polish traditions and values, to oppose what I call the "pedagogy of shame," the tendency that has dominated Poland over the past 8 years. We need new policy in terms of education, in terms of culture. This is not a revolution but reform. But, by the very nature of change, it will result in conflict (Jarosław Kaczyński, parliamentary speech, January 21, 2016).

Kaczyński's address in (1) realizes a pattern of conceptual conflation, whereby the political camp of the Civic Platform is linked to 'the old communist

regime' through their participation in the Round Table arrangements (though the Round Table as such is not mentioned in the text). This is a stable rhetorical characteristic which pertains to L&J's discourse and its stance on the opposition in the whole 2015–2023 period. The conflation involves seeing both 'power' and 'property' as valuable commodities that can be mutually exchanged or traded. As a result, the conceptualization of Civic Platform as a liberal party supporting market economy and privatization meets the conceptualization of 'communist elites,' construing one complex image of political-economic establishment wielding their power and influence over decades, now in new capitalist, modern disguises. Given the oppression suffered by Polish people in the communist years, such a conceptualization situates the current opposition – CP members, their followers – at the very far end of the US and THEM spectrum. The positioning of CP as an ideological THEM involves, further, the construal of the former CP rule as a period of Poland's political dependency and socio-cultural subordination. This conceptualization lies implicit in the 'pedagogy of shame,' one of the most frequent phrases in L&J's discourse. Originally coined by Kaczyński in 2007, it has been used on numerous occasions to denote a kind of sociopolitical inferiority complex characterizing, on L&J's view, the foreign policy mindset of the pre-2015 liberal government (Hayden, 2020; Cap, 2022). Though quantitative considerations are outside the direct scope of this paper, it is worth noting that the phrase in question appears as many as 128 times in the 100 texts of the L&J selection, making a highly significant contribution to ideological distinctions forced by Kaczyński and his party colleagues. In the text above, it directly legitimates the firm assertion of 'conflict' in the final line – a concluding judgment emerging from what Kaczyński wishes to present as rational consideration of two opposing ideological positions that cannot be reconciled, thus generating a crisis.

Made shortly after the October 2015 elections, Kaczyński's parliamentary address in (1) is often considered an ideological manifesto as well as a rhetorical blueprint for the kind of public discourse performed by all L&J politicians, including government officials, during the full eight years of their rule in Poland (Tomczak-Boczko et al., 2023; Gardulska, 2024). In the first parliamentary term (2015–2019), the vast majority of these performances merely reiterate Kaczyński's general observations – regarding identity, the post-communist condition, and

the existing ideological divisions. However, toward the end of the term, the main points of Kaczyński's 2015 speech turn into a coherent ideological framework for direct threat generation. This new and more coercive discourse features some new cognitive-pragmatic strategies, particularly proximization. As has been mentioned in section 2, the strategy of proximization consists in the use of linguistic and discursive means to force the conceptualization of a material or ideological adversary – THEM – as encroaching, physically or ideologically, on the 'home camp' – US – shared by the political leader and his supporters. As such, proximization is instrumental in obtaining public legitimization of actions that the leader proposes to prevent or stop the invasion. Since L&J's home-front discourse addresses their (parliamentary) opposition in essentially ideological terms, the proximization strategy used reveals a strong axiological element:

2) We have to redouble our efforts in the face of a threat that persists. We draw strength from the values that we hold dear: our families, our homes, our Christian faith. We must keep our eye fixed on the Poland we want to build – one that defeats our adversaries by promoting dignity, equal opportunity and justice. We must remain alert – lest we wake up, one day, in the old Poland (PM Mateusz Morawiecki, interview for state TV channel TVP Info, June 21, 2019).

In Morawiecki's interview above, the framework for proximization is the opposition between values associated with the 'home camp' represented by the current L&J government and the (presumably) antagonistic values associated with 'the old Poland,' denoting – presumably again – the entire post--transformation period but particularly the rule of the Civic Platform between 2007 and 2015. The two presumptions follow from the way in which the US and THEM camps are defined in the speech. While US is marked explicitly in terms of values such as 'dignity,' 'opportunity,' 'justice,' as well as religious and family values, THEM is defined implicitly by the implicature of contrary values indicating the adversary. The key lexical item triggering this implicature is the verb 'defeat,' which indirectly marks the THEM values as conceptual opposites of 'dignity,' 'justice,' and so on. Emerging from this specific characterization is a generalized

flashback vision of 'the old Poland' as a country of injustice, social inequality, and ruthless, anti-family ideology.

Building on thus constructed conceptual opposition, the strategy of proximization involves construal of the antagonistic ideology as a 'persisting threat' that is dormant yet able to (re-)appear, coming in the way of L&J's reforms to build 'a new Poland.' As one of the objectives of Morawiecki's interview is to evaluate, from a four-year perspective, the results of multiple social programs passed by the L&J majority right after the 2015 elections, this threat can be read further – in material terms – as an encroachment on the continuation of these programs in case the CP opposition returns to power. The caliber of the threat, and the emerging momentousness of the situation, are communicated via construals involving different pragmalinguistic ploys, particularly indefinite descriptions[8]. The role of indefinite descriptions in threat generation consists, generally, in construing uncertainty of the future, conceptualized as a period that extends from the moment of speaking to an indefinite future point on the time axis (Dunmire, 2011). The threat element of such a conceptualization lies in the vagueness of the construed vision: it is impossible to determine the moment when the threat *could* materialize. The result is that anxiety levels rise, as the absence of clear outlines of the threat means that no specific countermeasures can be prescribed (Dunmire, 2005, 2011; Cap, 2022). In Morawiecki's interview, this mechanism is exploited in the closing sentence of the text. The threat is described as ominous yet unpredictable; it can happen 'one day,' but there is no remedy other than staying 'alert.' The latter judgment counts, in political terms, as a call to maintain support for the ruling party.

In the second term (2019–2023), the conflictual stance of L&J's home-front discourse becomes increasingly salient, as more and more adversarial groups are identified and targeted, often beyond the parliamentary arena or beyond the domain of state politics in general. This change begins in the context of momentous political events happening around the time of the 2019 elections.

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[8] See Cap (2022) for an account of the role of other pragma-rhetorical elements in Morawiecki's interview, such as nominalizations (viz. 'persisting *threat*') and presuppositions ('lest we wake up').

On December 6, 2019, over 250,000 people take to the streets of Warsaw, protesting against a raft of changes introduced by the L&J government to all levels of the Polish judicial system, encroaching upon the constitutionally guaranteed independence of judges and prosecutors. Accusing the government of undermining the rule of law and flouting the constitution, the protesters call upon EU institutions to review the new laws. A few days later, in his interview for a far-right daily *Gazeta Polska*, Jarosław Kaczyński makes a clear and unequivocal response to these calls:

> 3) This is a return to the old methods. This habit of denouncing Poland to foreigners. In Poland there is a fatal tradition of national treason. And this is precisely tied to that. It is sort of in the genes of some people, the worst sort of Poles. And that worst sort is precisely now extraordinarily active, because they feel threatened. They are afraid today that the times are changing, that the time is coming when things will be as they are supposed to be, and another type of person – that means, those having loftier, patriotic motivations – will be placed in the lead, and that will apply to every aspect of social life, including economic life (Jarosław Kaczyński, December 11, 2019).

This memorable comment by the L&J leader initiates what is often described as the 'worst sort of Poles' narrative (Cap, 2022; Tomczak-Boczko et al., 2023; Gardulska, 2024) – a macro-temporal conceptual and discursive strategy of instilling social divisions and deliberately provoking social conflicts and crises in the country, in order to create conditions for the enactment of strong leadership and effective policy legitimization. In contrast with the 2015–2019 discourse, the 'worst sort' narrative applies far beyond the L&J parliamentary opposition – it targets virtually all social groups identified by the Party as more or less open opponents to L&J's 'reformatory' policies introduced after the 2015 elections. Included in these groups (or rather one common out-group) are in turn all those, viz. (3), whose 'motivations' are not 'patriotic enough' and whose ideologies stand in conflict with the 'traditionally conservative' values of the Polish nation. This makes the 'worst sort' a truly heterogeneous category: from legal activists and

defenders of the constitutional order, to feminist groups, to the LGBT community ('an imported movement that threatens our identity'[9]), to environmentalists urging a decrease in coal production (a '*national* treasure' of Poland, in L&J's discourse) to curb pollution, among many others. On L&J's view, reflected in the majority of the 2019–2023 discourse, the activity of these groups is inspired by foreign interests and/or foreign ideologies and thus must be considered anti-Polish. This conclusion is used in turn as a premise for a logical shortcut to call the followers 'national traitors,' as Kaczyński does in his press interview in (3).

Foreign issues: inside or outside the EU?

As has been mentioned, the eight-year rule of the L&J government reveals a rich history of crises and conflicts in Poland's international relations, particularly between Warsaw and Brussels. These conflicts, largely created and then perpetuated by L&J's discourse, involve principally two domains. One is L&J's complete overhaul of the Polish judiciary, which was addressed (undeservedly briefly, because of space limitations) in the previous section[10]. The other, even more critical, is the issue of migration and the stance of Law & Justice on the EU immigration policy to handle the unprecedented migration crisis in Europe continuing since 2015. I have noted in the Introduction that immediately after assuming power in October 2015, the L&J government openly refused to honor the EU refugee relocation agenda agreed on by the former government only a few months earlier.

The analysis of L&J texts demonstrates that in its entire ruling period, the L&J government draws on the migration conflict domain to construct a specific kind of discourse, which can be termed the discourse of 'national sovereignty' (Tomczak-Boczko et al., 2023; Gardulska, 2024; etc.). While the sovereignty discourse is developed in relation to international issues, its principal target group remains the Polish political audience and L&J voters in particular. Raising questions of

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9 PM Mateusz Morawiecki in the Sejm, February 10, 2021.

10 See Cap (2022, ch. 5) for a full picture.

political, economic and, not least, personal security, the sovereignty discourse of L&J has the primary goal of enacting strong and effective leadership, which guarantees people's safety notwithstanding the ominous presence of an external threat. The threat is constructed as less or more direct and tangible, extending over Poland seen as a sovereign state (a political kind of threat) and simultaneously as a free nation (an ideological threat). In other words, the threat to the country resulting from the migration crisis and abiding by the relocation plan proposed by the EU comprises, in L&J's sovereignty discourse, a direct threat to security caused by the influx of foreigners representing different cultures, ideologies, and religions, as well as the threat of a growing political subordination to Brussels.

Whichever kind of threat is considered, national identity and state security emerge as the two fundamental concepts shaping the anti-migration stance of L&J's sovereignty discourse, providing it with all necessary elements to construct argument that delegitimizes and rejects scenarios such as the European relocation schema. The identity-based argument serves to establish a firm and lasting US-vs.-THEM distinction, signaling issues and areas of possible political conflict (with the EU) as well as direct sociocultural clash (involving immigrants as such). The distinction is thus multidimensional; it subsumes a heterogeneous THEM, which includes migrants construed as a direct 'invader,' but also EU institutions as promoters of the relocation agenda. This means that EU is constructed, ironically, as a *foreign* entity, contrary to political facts. To draw up such a distinction, L&J leaders often appeal to the Polish Christian heritage, from which they derive distinctive national values such as freedom, tolerance, independence and, crucially, national pride. The concept of national pride is discursively related to the Polish historical legacy such as being at the heart of momentous developments in the history of Europe and the world (the WWII, fall of communism, etc.). It is construed as a precious commodity that must be safeguarded from any external danger or influence:

4) We are a proud, independent nation of free people whose character has been shaped in the most difficult and tragic moments of European history. We stand firm by our Christian heritage, the values to which our nation has been committed for centuries and to which we are

> committed today. As Christians, we are raised to be tolerant and respectful of other cultures. But we ask the same kind of respect from others. It is our right to decide whom we welcome to our own house. Because there are cultures, there are values, which simply cannot coexist (PM Mateusz Morawiecki, September 5, 2018).

Made during a parliamentary debate on immigration, Morawiecki's statement in (4) includes the very central identity claims characterizing L&J's (anti-) immigration discourse. Its goal is to consolidate the home camp in its commitment to common values – freedom, sovereignty, tolerance – which stem from a common cultural and religious background. At the heart of the message lies a strong appeal to the sense of 'independence,' which invokes, retrospectively, core elements of the national heritage in order to define and legitimize the current and future responsibilities[11]. The historical flashbacks foster the spirit of exceptionalism, endorsing further claims of national uniqueness and implying particular rights that go with it, such as 'the right to decide whom we welcome to our own house.' The HOUSE metaphor, echoing the CONTAINER schema often invoked in political isolationist discourse (Hart, 2014; Koller et al., 2019), adds to the aura of national solidarity, cementing the in-group and mobilizing it against possible negative scenarios, such as implementation of the relocation proposal. Rhetorically attractive and thus highly shareable (Musolff, 2016), the metaphor functions, first of all, as a trigger of positive emotions (consolidating US on a positive plane) but, indirectly, also as a coercive, threat-based device. The latter follows from a possible conceptualization of HOUSE as a 'rupturable container,' which can get damaged – or destroyed – because of external pressure (Hart, 2014), i.e. the impact of immigration.

The interpretation of the HOUSE metaphor as a trigger of threatening conceptualizations brings me to the key security pillar of L&J's 'sovereignty discourse.' Developing the vision of immigration as a tangible, potentially physical threat, L&J's rhetoric uses the US-vs.-THEM differences and distinctions

[11] See Koller et al. (2019) on analogies to Farage's Brexit discourse.

drawn previously in other domains (such as the cultural domain addressed by Morawiecki) to present them as growing, irreconcilable and, eventually, directly threatening. This entails the application of structured argumentation patterns, involving fixed lexical, grammatical, and text organization choices. The most salient of these patterns[12] is a text-level schema comprising an interplay of ideological and physical meanings in the process of discursive (axiological and spatial) proximization (cf. Cap, 2013). Axiological proximization is applied first to establish an abstract distant vision and spatial proximization is used subsequently to redefine that vision in terms of a material threat:

5) Our position has been clear from the beginning. The issue of immigration from the Middle East should be resolved where it has originated. By advancing freedom and democracy in Syria and Iraq, we help end a cycle of **dictatorship and radicalism**$_{NP}$ that **brings millions of people to misery and frustration**$_{VP}$, and **brings danger and, one day, tragedy to**$_{VP}$ **our own people**$_{NP}$ (Jarosław Kaczyński, May 13, 2019).

In example (5) Jarosław Kaczyński sets up an explicit link between the social and political conditions of immigrants' lives in their home countries ('Syria and Iraq'), and their social and psychological effects ('misery and frustration'), which can trigger disastrous consequences in the long run, once immigrants arrive in Poland ('one day, tragedy, to our own people'). Such a logic is meant to support L&J's rationale for handling the immigration issue far away from European borders. Kaczyński's argument unfolds in a linear manner, connecting apparently remote visions with, eventually, closely happening events. At the lexical level, nominal phrases are used to mark the US-vs.-THEM opposition in ideological terms ('our people' vs. people living in 'dictatorship and radicalism'), and verbal phrases ('brings millions of people,' 'brings danger') are applied to proximize THEM's anticipated impact. Generally, the argument involves a discursive transition from a starting scenario of 'remote possibility' to a redefined

[12] Particularly in the 2015–2019 texts.

scenario of 'actual occurrence.' Each of the scenarios is enacted linguistically by the combination of a nominal phrase (NP) with a verb phrase (VP) – as indicated by the subscript in (5). The effect is a highly coercive fear appeal, invoking a material threat from mass migration into Poland, but also a threat of political subordination to EU institutions as promoters of the relocation schema. The perpetuation of the latter threat defines the essentially populist function of L&J's 'sovereignty discourse,' aimed at the home audience rather than international partners.

The discourse of the 'coalition for democracy' in the 2023 election campaign

As evidenced in 3., the leadership discourse of Law & Justice in the years 2015–2023 can be described as essentially threat-based and coercive, involving a mix of established as well innovative populist and propagandistic strategies, from ideological polarization, to prompt identification and delegitimization of the (political) opponent, to the swift and efficient management of thus generated conflict and the following crisis. The consistency, effectiveness, and undisputed success of L&J's political narrative over the years begs an intriguing question of how the impact of L&J's discourse was finally neutralized in the 2023 campaign – what weaknesses were identified and targeted, and what alternatives were proposed. The discussion in this section focuses on two narratives developed by the 'coalition for democracy' – the Civic Platform (CP), Third Way (TW) and The Left (L) parties – to delegitimize the L&J rule and win support for their own program. I call the first one the 'security narrative' – an essentially geopolitical argument constructing Poland's safety as directly dependent on the status of its international relations, particularly the condition of Poland's partner relations (with)in the EU and NATO. The other narrative, largely socio-psychological in character, is referred to as the 'smiling Poland narrative.' It brings together a host of domestic issues involving the relations Polish people have with their state, and links personal well-being to a number of social freedoms which the state institutions must guarantee.

The security narrative

Performed consistently by the leaders of the three opposition parties, the security narrative can be considered, from a pragmatic standpoint, a future-oriented original proposal, and simultaneously an interdiscursive response to L&J's stance on foreign policy demonstrated in its entire ruling period:

6) There is nothing wrong in being a proud state. There is nothing wrong in asserting the right to speak loudly on matters that concern us all. But it is wrong, in these critical times, to continue to confuse pride with arrogance, to seek adversaries rather than partners (CP's Chairman Donald Tusk at an election rally in Rzeszów, April 23, 2023).
7) For the first time since 1945, war in Europe is becoming real again: we might currently be sliding into a pre-war era. At the same time, because of their incompetence and often sheer stupidity, this government is leading Poland out of the EU. This madness, this embarrassment of ourselves, could eventually cost us more than ridicule. Why, some might ask. Because an alienated Poland is a Poland exposed to the greatest risks. But I can guarantee you that we will make Poland return to its rightful place, to the mainstream of EU and NATO politics (TW's Chairman Szymon Hołownia at a rally in Gdańsk, May 8, 2023).
8) Even those skeptical about EU and EU policies must accept a simple truth: we cannot afford conflict with Brussels when real danger is lurking around the corner. Anyone who does not understand it is playing into Putin's hands (L's Chairman Włodzimierz Czarzasty at a rally in Łódź, June 6, 2023).

The argument developed in (6–7–8) assumes that Poland's security as a state derives directly from its EU and NATO membership and thus it is the country's raison d'état to keep its international relations strong and active. In making this argument, the CP/TW/L leaders draw upon the unfaltering support of Poles for their state's membership in the EU, which has never gone below the 75% threshold since the year of the accession (2004), only slightly declining in the eight years

of the L&J rule (Gardulska, 2024). The pro-European and pro-NATO argument is then contrasted with L&J's openly Eurosceptic stance and policies, which have not changed notwithstanding a dramatic change in geopolitical context triggered by the Russian invasion on Ukraine. This contrast is used to produce a final vision, which is the vision of political as well as military alienation that carries a tangible, material threat to Poland. Such a vision delegitimizes L&J's foreign policy and thus the entire government, on the grounds of favoring its party line over the interest of the state.

Interestingly – and unlike their L&J opponents – the coalition leaders avoid highly radical claims in regard to the present (a time when L&J's policies are manifestly 'embarrassing' and open to foreign 'ridicule,' but have not yet produced irreversible effects), inviting the addressee to imagine and consider themselves the dire consequences of L&J's further rule. Neither Tusk nor his coalition colleagues aim to denote these consequences precisely, but phrases such as 'real danger is lurking around the corner,' 'could eventually cost us more,' 'sliding into a pre-war era,' or 'playing into Putin's hands' do enough to outline an ominous, *radically* threatening future. The progressive used in the phrases reveals a specific function – it links the future with the present (cf. Dunmire, 2005), associating the threatening future anticipations with the current L&J rule and thus performing an accusatory role. At the same time, the combination of the progressive and the patterns of 'probabilistic modality' ('might currently be sliding,' 'could eventually cost us') adds to the caliber of the gathering threat, by making its particular elements largely undefined (cf. Dunmire, 2005, 2011).

The rational, balanced management of radical claims concerning L&J's policies accords with a balanced stance the coalition leaders demonstrate, here and in other texts in the selection, in their own concept of foreign policy. This concept is particularly salient in Tusk's argument in example (6). Stating that 'there is nothing wrong in being *a proud state*' and that 'there is nothing wrong in *asserting the right to speak loudly* on matters that concern us all,'[13]

[13] Emphasis mine.

Tusk makes an intertextual reference to claims used in the entire 2015–2023 period to enact the key features of L&J's ideological stance (see section 3). Revealing a conciliatory posture toward these messages, he defines his essentially pragmatic policy mind-set and simultaneously acknowledges a space for dialogue with his L&J adversaries. In the latter, he makes an indirect appeal to L&J voters, acting as a representative of some of their core beliefs and expectations, notwithstanding his different political affiliation. This move not only creates a chance to broaden Tusk's electorate in the short run, but also contributes to his general image as a responsible and rational leader possessing substantial geopolitical awareness. The judgement in the final part of the argument ('it is wrong, in these critical times, to continue to confuse pride with arrogance, to seek adversaries rather than partners') further underscores these qualities, while simultaneously detracting from the leadership potential of the L&J camp.

Taken together, examples (6–7–8) represent what Dunmire (2005, 2011, etc.) calls the rhetoric of 'alternative futures.' Alternative futures can be described as conceptual projections of alternative policy visions defined by political actor to identify with one and reject the other. Construing the future in alternative ways involves a variety of linguistic mechanisms and forms, including specific evidential, modality and mood configurations derived from general premises such as factual evidence, history and reason (Dunmire, 2005). Through all these means, political leaders define what they consider *privileged future* (a controllable future they subscribe to) and, on the other hand, what they deem *oppositional future* (a future of unpredictable and usually threatening outlines). I have already mentioned the role of modality in drawing up this distinction, but in fact there are further relevant lexical and grammatical devices in the texts, and even in example (7) above one can identify another such ploy – a strategically embedded interrogative ('Why, some might ask') whose function is to strengthen a contrast between the privileged future of (international) cooperation and the oppositional future of alienation. Overall, construing the future in alternative, black-and-white ways brings, according to Dunmire (2005, 2011), substantial discursive and, what follows, political benefits. Well-argued anticipations of the future play a key role in political leadership based on 'rational consideration

of options,' and can be viewed as a type of legitimization device 'to shore up calls for particular policies and actions' (Dunmire, 2005, p. 481).

The security narrative is also used to delegitimize some of L&J's policies on the home front, such as the radical changes in the judiciary, initiated by the L&J government right after the victorious 2015 elections (cf. section 3). The continuing massive criticism of these changes by top EU institutions is a premise to construct visions of growing international isolation leading to increased geopolitical and thus also military vulnerability of the state:

> 9) What is it that brought us all here today? A pseudo-Court of Justice, a group of masqueraders in judicial robes, by order of the party's leader, in violation of the constitution, decided to take Poland out of the EU.[14] This means that unofficial Polexit is already under way. What happened in the UK is starting here. We need to stop it before we wake up and see that our eastern border is no longer an EU border, that we have just moved hundreds and hundreds of kilometers away from our safety. It's time to sound the alarm. (Donald Tusk at an anti-government demonstration in Warsaw on March 10, 2023).

In this address Tusk draws a well-grounded, appealing connection between L&J's politically motivated reform of the judiciary, the way the reform has encroached on EU law in rulings of the highest judicial bodies such as the Constitutional Tribunal, and the consequences such a situation holds for Poland's further membership in the Union. His argument, unfolding in a linear manner, earns its plausibility not only from the kind of content it communicates, but also – if not mainly – from the simple, easy-to-follow form facilitating the uptake in the service of fast, direct persuasion. First, drawing upon socio-psychological tenets of persuasion (Mann & Thompson, 1988; Cosmides, 1989), a relational proposition of cause-and-effect is established

[14] On March 3, 2023 Poland's Constitutional Tribunal, composed of judges appointed by the L&J parliamentary majority, ruled that the national constitution had always primacy over EU law, thus undermining the EU founding legal agreements.

between the second and the third sentence, the effect part ('Polexit is already under way') being shorter and easier to process and understand than the longer cause part ('A pseudo-Court of Justice, a group of...'). In the interest of prompt uptake and credibility, the target effect part starts with an explicit demonstrative ('This means that'), which sets up the principal, explicit causative link defining the main point of the argument – the gathering threat of 'Polexit.' This point is immediately endorsed by factual reference and analogy[15] ('What happened in the UK is starting here'), paving the way for the rest of the argument, which involves appeals for mobilization in the face of the growing threat. In that final part, Tusk makes use of some typical discourse of proximization, including spatial/physical imagery ('wake up and see,' 'we have just moved hundreds and hundreds of kilometers away'), presupposition of catastrophic future which unfolds unless a pre-emptive action is taken ('We need to stop it before...'), and centralization of the 'here and now' timeframe as the only (and short) moment to act ('It's time ...'). In fact, notwithstanding a great number of other rhetorical differences, the use of proximization by Donald Tusk and other coalition leaders does not seem radically distinctive compared to L&J politicians.

The smiling Poland narrative

Getting increasingly salient in the lead-up to the October 2023 elections, the 'smiling Poland narrative' outlines a forward-looking vision of a 'new Poland,' 'reborn' after a dark, gloomy period of the L&J rule. In its discursive dimension it involves a host of axiologically positive values, such as freedom, courage, energy, strength, diversity, openness, tolerance and empathy, which are construed as fundamentals of social life, as well as the institutional organization of that life in the new, 'happy' Poland. Similar to the security narrative, the smiling Poland narrative is both an original discursive framework and a response to certain themes in the L&J discourse. Specifically, it targets L&J's instrumental handling of the past, involving countless references to the most difficult and

[15] For credibility and persuasion effects of analogy see Musolff (2016), Cap (2022).

usually saddest periods in the country's history which the L&J government and their media propagandists used consistently to claim Poland's national uniqueness and moral superiority over other European states (Gardulska, 2024). Considering examples such as (6) above, it would be a mistake to say that the coalition discourse completely breaks with the legacy of the past. Still, it seems to recognize correctly people's expectations for a new kind of public discourse that offers a fresh alternative to the notoriously somber and bombastic stance of L&J leaders:

> 10) No-one can stop this force, this giant has awakened. Let no one among the ruling team have any illusions: change for the better is inevitable. This is a sign of Poland's rebirth. A peaceful rebellion for freedom and democracy. When I see these hundreds of thousands of smiling faces, I feel that this breakthrough moment is coming in the history of our homeland. (…) Millions have woken up. We are moving full of courage, vigor and determination towards the future, towards a Poland that is tolerant, diverse, European and smiling. The time has come for Poland to be happy. (…) The time has come to end 'the Polish-Polish war' – the naming as traitors of those who think differently, who feel differently, who look to Europe for help against discrimination and dictatorship. (…) Trust me: a great majority of Polish people are fed up with the corrupt, petty, backward-looking, obscurantist rule of the party led by a 74-year-old tired man, a kind of one-man walking anthology of resentment. The time has come to show this at the polls. Because we deserve to be a happy nation (Donald Tusk at the 'March of a Million Hearts' in Warsaw on October 1, 2023).

Delivered merely two weeks before the elections, this address by Tusk essentializes the main lexical features of the 'smiling Poland narrative.' Including a staggering number of items depicting an inner renewal of the country and its return to being a place of 'happy,' 'smiling,' 'tolerant,' 'diverse' people, the speech construes these values as a precious commodity that has been recaptured in a historic battle, where the 'courage, vigor and determination' of the Polish

people have ultimately prevailed. This flattering declaration, wrapped up with a bold 'we deserve to be a happy nation' in the concluding line, serves Tusk to enhance the aura of solidarity with the people, pave the way for the promise of mutually friendly and understanding relations between the people and the state, and thus claim for his future government the right to speak on true behalf of the nation. While this sort of rhetoric appears, somewhat ironically, similar to L&J's 2015 discourse, Tusk's address possesses an important distinctive element that is present, in fact, also in his other speeches of the late campaign period. Making use of appealing, sophisticated word choices and phraseological links, he seeks to establish a synecdochic, 'part-for-the-whole' relation between L&J's collective ideology and values, and Jarosław Kaczyński's individual characteristics ('the corrupt, petty, backward-looking, obscurantist rule of the party led by a 74-year-old tired man, a kind of one-man walking anthology of resentment'). There is no space to get deeper in the sociological underpinnings of this projection here, but given the fact that since early 2023 Kaczyński's personal popularity was on a steady decline (getting in the fall markedly lower than the approval ratings of his party; Gardulska, 2024), such a ploy seems another not-to-be-missed element in considering the possible reasons for the October 15 election results.

Concluding remarks

The unprecedented dynamics of the Polish political scene in the past 8 years follows from a multitude of social, sociopsychological, geopolitical, cultural and other factors, involving both domestic affairs and international developments/crises such as the Covid-19 pandemic and the Russia-Ukraine war. This paper has tried to show that discourse and discourse strategies – such as state-level strategies of communication with mass audience – clearly count among these factors, construing the particular events and contexts as different building blocks of political leadership. The analysis in the paper has demonstrated that radical populist discourse, involving ultra-strong socio-ideological polarization, strategic generation of internal as well as external conflict, threat construction

and crisis management can be an extremely powerful tool, able to grant long--term political leadership. At the same time, it follows from the analysis that, in a yet longer perspective, such a leadership runs a considerable risk of 'wearing out' and becoming less appealing, which presages political change. This is arguably because ideological distinctions invoked in populist conflict-charged discourse naturally have their roots in the past; thus, past conceptualizations (notably those of national exceptionalism and sacrifice) tend to dominate the leadership rhetoric, often at the expense of forward-looking, less bombastic but more pragmatic policy proposals. Interestingly, as suggested by Tomczak--Boczko et al. (2023) and Gardulska (2024), the same Eurosceptic strategies that helped the L&J party in constructing its stance of 'national sovereignty,' became a communication problem later on, when the invasion of Russia on Ukraine created an urgent need for the intensification of EU cooperation. This means that a 'hardcore' populist discourse involving conflict construction and crisis management could, in the course of time, turn counterproductive on not just the local but also international plane. The two narratives of the coalition for democracy ('security narrative' and 'smiling Poland narrative') analyzed in 4. are an illustration of how such a problem can be swiftly exploited by the opposing political force.

These points need, of course, further verification. Given the post-2000 rise of populist forces throughout Europe – the Alternative für Deutschland in Germany, the National Front in France, Bepe Grillo's Movimento Cinque Stelle in Italy, Nigel Farage's United Kingdom Independence Party in Britain, the Freiheitliche Partei Österreichs in Austria, Geert Wilders in the Netherlands, etc. – there is plenty of material to study in order to establish, with more evidence and precision, the longevity potential of populist leadership discourse, as well as its limitations in different geographical, geopolitical and socio-cultural settings. The Polish example discussed in this paper is hopefully an inspiring case – in no other EU country in this century had such a radical discourse kept its practitioners in power for a full eight years, the end of the rule being so abrupt and still not easy to explain.

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