

## CHAPTER 4

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# MARX AND ORGANIZATION STUDIES TODAY

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### 4.1. INTRODUCTION

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It is hardly obvious that Karl Marx, a philosopher, economist, and revolutionary activist who died a century and a quarter ago, should have much relevance to contemporary organization studies. Surely, the skeptic says, too many important features of contemporary organizations post-date Marx. On further reflection, however, it is obvious that organizations today share many fundamental features with those Marx saw taking shape in his time. In particular, we still live with a basically capitalist form of society and enterprise.

Marx's analysis was not only astute in discerning capitalism's enduring features: it was also deeply critical. He documented and denounced capitalism's dark sides—its enormous human and environmental costs. More controversially, he claimed to have identified some fundamental features of capitalist development that would lead inevitably to capitalism's demise and its replacement by a superior form of society.

This combination of perspicacity, critique, and prediction ensured that over much of the twentieth century Marxist thought was a key reference point for sociology in general and for organization studies in particular—as an explicit premise, or as a foil for contrasting views, or as a source of inspiration that was discreetly

left unnamed. In the last decades of the twentieth century, with the weakening of the labor movement in many of the advanced capitalist countries, with the culmination of anti-colonialist struggles in developing countries, and with the demise of the Soviet Union and its allies, Marxist ideas lost some of their traditional impetus. On the other hand, however, Marxist ideas have recently received new impetus from the rise of global justice movements and from growing concerns about capitalism's destructive environmental effects and its unstable financial structure.

Since Marx's time, the general matrix of Marxist theory has not remained fixed in doctrinaire rigidity: numerous variants of the basic theory have emerged (Anderson 1979; Burawoy 1990). This chapter's goal, however, is to show the fruitfulness of Marx's original insights; I therefore address only some particularly important points of debate among Marxists. The following sections discuss, in turn, Marx's basic theory, its main uses in organization studies, and its dialogue with other theories.

## 4.2. MARXISM: KEY IDEAS

Marx was born in Germany, in 1818, and died in London in 1883. He studied law and philosophy in Bonn and Berlin, where he participated in the iconoclastic, anti-religious 'Young Hegelian' scene. Political activism led him to Paris in 1843 and from there to Brussels, back to Germany, and eventually to Britain in 1849, where he began serious study of political economy. Throughout this period, he was active in revolutionary circles of Europe. He published several major works during his lifetime, and several others appeared posthumously (see a listing in the References below). He was supported financially by Friedrich Engels, who had inherited an ownership share in a textile manufacturing concern in Manchester. Engels was Marx's closest colleague in both writing and political activism. This section summarizes the main themes in Marx's (and Engels's) writing, with an emphasis on those that are most relevant to organization studies.

In *The German Ideology* (originally published in 1845), Marx and Engels mark their distance from Hegel and the Young Hegelians. They advance three main ideas. First, human action is constrained and enabled by its historically specific conditions: generic trans-historical theorizing is therefore a poor foundation for social science. Second, the ideas we work with, including abstract theoretical ones, are conditioned by our own historical context. And finally, because people must produce in order to live, the sphere of production is primary in relation to the sphere of thought and culture.

The *Communist Manifesto* (1848), the preface to the *Contribution to the Critique of Political Economy* (1859), the *Grundrisse* (1857), and *Capital* (1867) articulate Marx's analysis in more detail. The following sections highlight six main themes.

#### 4.2.1. The Class Structure and the Centrality of Class Struggle

If production is primary and if human production is by nature collective rather than individual, then the most basic structure of society is its 'mode of production'. (Concrete societies typically embody residues of earlier modes alongside their dominant mode.) Modes of production are defined by two sets of relations. 'Forces of production' are humanity's relations with the natural world, composed of material 'means of production' (equipment, technology, raw materials) and human productive capacities (skills, etc.). 'Relations of production' define the distribution across social categories ('classes') of rights to ownership and control over these forces of production.

The broad sweep of human history can be understood as the dialectical progression of successively more productive modes of production. In the European region, this progression was from primitive communism, to slavery, to feudalism, and then capitalism. Primitive communism has no class structure per se because the forces of production are too primitive to generate enough surplus to support a non-laboring class. Slave relations correspond to a technology of dispersed farming on large estates. Feudal vassalage relations correspond to small-scale agriculture and hand-craft tools. And capitalist relations of production—defined by the conjunction of wage-based exploitation within firms and competition between firms—correspond to machinery and large-scale industry. This progression is dialectical insofar as the emergence of a new structure is the result of the internal contradictions of the old. (On Marx's 'dialectical' approach and the idea that contradictions are to be found in reality rather than only among propositions, see Ilyenkov 1982; Ollman 2003.) Class struggle between the exploiting and exploited classes is the *motor* of this progression; however, its basic *direction* is set by the vector of advancing forces of production. When the prevailing relations of production are no longer able to assure the further advance of the forces of production, class conflict intensifies and the old class structure is eventually overthrown, allowing a new mode of production to emerge in which human productivity can develop further (see exposition by Cohen 1978). Capitalism is distinctive in this sequence because its characteristic relations of production greatly intensify pressures to further develop the forces of production; in comparison, all previous modes are far less technologically dynamic.

Marxist sociology and organization studies are characterized by their insistence that the relations of production and the resulting class structure constitute the

primary axis of social differentiation, determining the broad pattern of economic opportunity, education and health conditions, and political orientations. Marxist theory was for many years the foil against which were elaborated sociological theories of 'the end of ideology', which culminated in 1950s 'functionalism' and the celebration of normative integration of US society. Marxism is one of the family of 'conflict' theories that re-emerged in opposition to this 'apologetic' condition in sociology.

#### 4.2.2. The Specific Form of Capitalist Exploitation

Capitalism as a mode of production is distinguished by the centrality of commodity production (see Foley 1986 for a particularly clear exposition of Marx's theory). A commodity is a product (good or service) produced for sale rather than use—a 'contradictory unity', Marx says, of exchange-value (the commodity's capacity to command other products and money in exchange) and use-value (its capacity to satisfy a need or desire). Capitalism emerges from small-scale commodity production when labor too becomes a commodity. This happens through a process of violent dispossession that deprives workers of alternative ways to access means of consumption or production, and that thus forces workers to exchange their capacity to work for a wage as if this creative capacity too were a commodity.

Marx follows classical political economists such as Ricardo in arguing that supply and demand do not determine the price of a commodity (as argued by neo-classical economics), but only influence its fluctuation around its objectively determined value. This value is determined by the socially necessary labor time invested in the product's production. (Note that, contrary to a popular misconception, this 'labor theory of value' is not a normative theory: Marx is not arguing that value should be based on labor input; he is adamant that use-values typically also require a host of non-labor contributions; his theory aims to explain how capitalist exchange-value actually works.) Under normal conditions, labor power too receives a wage that reflects the socially necessary labor time required to produce it, which is the cost of the daily consumption required for workers and their families as well as of their investment in training and education. (Note that for Marx, the value of labor power has a social and historical component: it is not just a biological minimum as assumed in Malthus's account.) Given the level of advance of the forces of production in the capitalist phase of historical evolution, it only takes a few hours in the working day for workers to produce the equivalent of their wages ('necessary labor-time'); and employers can legally appropriate the value produced in the rest of the working day ('surplus labor' and thus 'surplus value') with which to pay both the non-labor inputs and investors' profit.

When Marxists use an ethically charged term such as 'exploitation' to describe these relations of production, non-Marxists often criticize them for lack of

objectivity, since even in Marx's own theory it is assumed that wages normally reflect the value of labor power, and since no economic growth would be possible without some surplus being withheld. Marx, however, understands the need for a surplus; but he argues that surplus labor represents exploitation because workers have no control over the use of that surplus and because their share is depressed by the portion siphoned off for capitalists' private consumption.

Calling this wage relation 'exploitation' captures nicely its essentially conflictual character. On the one side, under competitive pressure in product and financial markets, employers are pushed to increase surplus labor, regardless of their personal preferences. On the other side, workers struggle to maintain their jobs, their dignity, and their wage levels. Exploitation and class conflict are thus not abnormal conditions created by distortions of the market process: they are a fundamental feature of capitalist production even under hypothetically pure competitive conditions.

To emphasize conflict is not to deny the simultaneous need for cooperation in production. Indeed, the large-scale capitalist enterprise depends crucially on cooperation to coordinate its complex division of labor, and managers play a key productive role in that coordination. Managers roles are, however, simultaneously productive and exploitative (Carchedi 1977; Wright 1985), and labor-management relations in the capitalist firm embody a contradictory unity of cooperation and conflict, reflecting the basic use-value/exchange-value contradiction of the commodity itself.

### 4.2.3. The Development of Capitalist Production

Marx identifies two generic strategies for increasing surplus labor. First, capitalists can extend and intensify the working day and can force more members of each family into the labor force: these generate what Marx calls 'absolute surplus-value'. Second, employers can respond to competitive pressures with technological and organizational innovation that reduce necessary labor time: this generates 'relative surplus-value'.

When capitalism first establishes itself, firms usually leave the technology of production unchanged, and exploitation takes the form of increasing absolute surplus-value. The resulting contrast in hours and intensity of work between traditional village life and early factory life has been documented in numerous scholarly and literary accounts (see Thompson 1963). This is what Marx (1976: Appendix) calls the *formal subordination of labor to capital*: it is merely formal because the underlying production process is as yet unchanged. As capitalism consolidates, the negative social externalities of excessive working hours and of child labor prompt political action by both workers and enlightened capitalists, resulting in new laws and regulations. These increase incentives for firms to accelerate technological innovation, and as a result, relative surplus-value becomes progressively more important, and

we see the emergence of the *real subordination* of labor to capital as the labor process itself is progressively reshaped.

The contradictions of capitalism do not disappear with this shift from absolute to relative surplus-value and from formal to real subordination—they deepen and mature. Marx sees capitalist development as the unfolding of a real contradiction between, on the one side, the ineluctable tendency towards what he calls the ‘socialization’ of the forces of production, and on the other side, the maintenance of an increasingly obsolete structure of relations of production based on private property of the means of production. Marx’s concept of socialization was more expansive than in current usages: activity is socialized insofar as it comes to embody the capabilities of the larger society rather than only those that emerge from isolated, local contexts (e.g. Marx 1973: 705; 1976: 1024).

The socialization of the forces of production plays out at three levels. First, it appears as the growing mastery of large-scale cooperation in complex organizations. The individual worker is now productive only as part of what Marx calls a ‘collective worker’. In this light, techniques of work organization—such as the principles of bureaucracy, scientific management, or lean production—are part of the forces of production. The development of such principles represents steps towards socialization insofar as they allow more rational, conscious planning and management of large-scale, interdependent operations.

Second, on a more global level, the socialization of the forces of production means that increasingly differentiated, specialized branches of activity are conjoined in an increasingly interdependent global economy. Even though this interdependence is coordinated by the invisible hand of the market rather than by conscious planning, society’s productivity is increased by the development of universally accessible science, by the latter’s embodiment in specialized materials and equipment, and by the ability to access and integrate these capabilities on an increasingly global scale.

Finally, socialization appears on an individual, subjective level. When the effective subject of production is no longer an individual worker but the collective worker, workers’ identities change—they are re-socialized. (Marx’s analysis is similar here to Elias 2000.) The development of the forces of production pulls workers out of what Marx and Engels call in the *Communist Manifesto* ‘rural idiocy’. In the *Poverty of Philosophy* (1995), Marx similarly celebrates the end of ‘craft idiocy’. Marx’s use of the term ‘idiocy’ preserves both its colloquial sense and the meaning from the Greek *idiotes*, denoting an asocial individual isolated from the polis. At the opposite end of the spectrum from the *idiotes* is the ‘social individual’ described by the *Grundrisse*, in the form of the technically sophisticated worker who accesses and deploys society’s accumulated scientific and technological knowledge.

Marx argues that these various forms of the socialization of the forces of production are stimulated by the capitalist relations of production and the associated

pressures of competition and exploitation; and at the same time, however, these latter pressures distort and limit socialization. Instead of a broadening association of producers progressively mastering their collective future, this socialization appears, at least at first, in the form of intensified coercion by quasi-natural laws of the market over firms and by corporate bureaucracy over workers. Under capitalist conditions, the substance of socialization takes on a form that is exploitative and alienating. Forms of work organization, for example, are means of coordination in the form of means of exploitation. To use a dialectical formulation: the content is in contradiction with its form.

The socialization tendency is, however, difficult to repress, and eventually, the exigencies of production impel the socialization of the relations of production too. The latter appears at first in limited, capitalistic form, as the shift from private to public corporations, the concentration of ownership, and the growing government role in the economy (the ‘creeping socialism’ denounced by Hayek 1944). But these partial steps encourage rather than undercut calls for further socialization: Schumpeter’s (1942) account is very faithful to Marx’s analysis, even if his regretful tone contrasts with Marx’s enthusiasm. Eventually, Marx predicts, we will see a wholesale ‘socialist’ transformation that reestablishes a correspondence between relations and forces of production at a new, higher level—between socialized ownership and control and socialized production.

#### 4.2.4. The Social Impact of Capital Accumulation and Commodity Production

In the *Manifesto* and elsewhere, Marx is eloquent on the progressive content of this process of capitalist development. The world market brings humanity together, to huge productivity advantage and freeing us from parochialism and petty nationalism. But Marx is also savage in his critique of the dark side of this historical process.

Consider commodity production. Competition drives technological innovation, prompting the proliferation of new goods and services. On the one hand, there is no denying the use-value of many of these new products. On the other, many of them are frivolous or even dangerous, and the underlying market process has an enormous social cost in employment precariousness and environmental damage. Moreover, capitalism as a system of generalized commodity production engenders *commodity fetishism*. Instead of mankind consciously and collectively mastering modern industry’s complexity, commodities appear as the active agents, struggling for monetary recognition. Abstract ‘laws of the market’ impose themselves as an alien, coercive force. The structure of the capitalist economy works to produce an

inverted understanding of itself in our minds, as if the market ‘decides’ while we merely submit. *Alienation* is a structural feature of such an economy.

The commodity form progressively takes over more spheres of activity such as food production and preparation, childcare and education, healthcare, and culture. In this process, traditional forms of community—with both their attractive features and their features inimical to women’s freedom and to creative individual flourishing—are swept away, as gift exchange and traditional fealty are replaced by the cash nexus and instrumental association. In place of local markets, a global market emerges for products, labor power, and finance: small-scale commodity producers (the traditional petty bourgeoisie) disappear, and a new middle-class of salaried managers and experts is created.

Alongside a general tendency to improvement in average standards of living, capitalist growth continually reproduces unemployment and poverty. Capitalism develops not only endogenously but also through imperialist expansion (see Brewer 1980), and as capitalists based in the more ‘advanced’ regions exploit the populations of the less advanced regions, average incomes and health conditions improve, but at the cost of considerable poverty and misery.

#### 4.2.5. The Limits of Capitalist Development

Capitalism is not the last in the sequence of modes of production; it is not the end of history. As capitalism develops and expands, not only does socialization consolidate the material preconditions for socialism, but the conditions for a revolutionary change in the mode of production progressively ripen.

On the one hand, the system loses its historical legitimacy. In *Capital*, Marx shows that an economy based on competition will necessarily experience periodic crises, and that in the long term, these crises are more likely to worsen than to moderate. Each firm, in order to survive, must attract investment funds and grow faster than its peers; this creates a permanent tendency to overproduction. The dynamic equilibrium of the capitalist economic system relies not on conscious planning but on the spontaneous functioning of the market—plus, since the mid-twentieth century, some very crude instruments of government intervention—and as a result, its homeostatic properties function only poorly and at enormous social cost. As markets expand in geographic scope, crises sweep across ever-larger regions. As the productivity of modern industry grows, the parallel growth of inequality, the persistence of poverty, the periodic crises, the development of negative social and environmental externalities become ever more incongruous, indeed obscene.

On the other hand, the social class capable of doing away with capitalism and creating a new form of society becomes stronger. The working class—broadly



construed as those who must sell their capacity to work, whether they be blue- or white-collar, skilled or not, urban or rural—is strengthened by the development of capitalism itself: as the forces of production develop in a socialized direction, they call for an increasingly educated workforce; workers are brought into ever-larger units of production and acquire habits of coordinated activity; communication technologies facilitate workers' collective action; and the everyday experience of class struggle both at work and in the electoral sphere teaches workers how to mobilize. Recent Marxist sociology has paid less attention to the positive effects of capitalist development on working-class capabilities; but it has been constant in highlighting the persistence of crisis tendencies and the wastefulness of the market mechanism.

#### 4.2.6. The Role of Politics, Ideology, and Culture in Class Struggle and Social Change

In Marx's materialist account, ideas, political action, and culture are important causal factors in both the reproduction and the transformation of society; but they are secondary relative to the effects of the structural contradictions characteristic of the capitalist mode of production. The state is basically an instrument of class domination, as are culture and religion. Marx allows that this political-ideological superstructure has a certain autonomy relative to the technological-economic base of society, and that it has real effects on the base. In the broader sweep of history, however, this autonomy is relative and the bidirectional causality is not symmetrical. (In a famous footnote in *Capital* (Marx 1976: 175–6), Marx notes that the base has less direct influence in pre-capitalist societies than in capitalist ones; but he argues that if politics was the dominant factor in ancient Greece, and if religion was the dominant force in the Middle Ages, it is the economic structure of those societies that in turn explains why these superstructural factors were so influential.) Exactly how to conceptualize this asymmetry has been the object of a long debate among Marxists (for an overview, see Jessop 2001). Marxist-inspired sociologists such as Domhoff (1983) highlight the class character of the state. Kolko (1963) and Weinstein (1968) show the dominant role of ruling-class interests even in relatively benign domestic legislation as well as foreign policy.

Revolutionary change would require the political and ideological mobilization of the working class against this domination. The objective contradictions created in the realm of production (the maturation of the productive forces and the acuteness of their contradiction with prevailing relations of production) as well as the conflicts within the political and cultural realms together create more or less propitious circumstances for this mobilization.

### 4.3. REASSERTING MARX

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Marxist scholarship faces several challenges in the organization studies field. First, many organizational scholars today are based in business schools, where they labor under the weight of instrumentalist norms, and the Marxist perspective offers little if research is seen as valuable only insofar as it helps managers fulfill a mission of shareholder wealth maximization.

In contrast to this institutional challenge, several of the properly theoretical challenges posed to Marxism reveal strengths of the Marxist approach. First, skeptics wonder what credibility we should accord Marxist theory when the polities that claim inspiration from Marx—notably the former Soviet Union—seem to have failed. However, Marxist theory provides a good starting point for understanding this failure (for a short overview, see Murphy 2007; for a more comprehensive survey, see Liden 2007) and indeed most Marxists at the time of the Bolshevik Revolution were skeptical of prospects for socialism there, since its economy was so backward.

Second, critics argue that the lack of revolutionary activity on the part of the working class belies the Communist Manifesto's argument that capitalism 'produces its own gravediggers' and that socialism is therefore inevitable. However, Marx never predicted any specific life-span for capitalism. While his political writings sometimes express enthusiastic optimism for imminent change, his theory only predicts the form of capitalism's development and the increasingly likelihood of its supercession—not whether capitalism's supercession is years, decades, or centuries away (Desai 2002).

Third, Marx seems focused on factory work, so some might wonder what he has to say about a modern economy based mainly on services. However, Marx's insightful comments on clerical and sales and other services (notably in *Capital*) have provided a platform for fruitful research on service work of various kinds (e.g. Callahan and Thompson 2001). Similarly, skeptics might wonder whether Marx is relevant in an age when knowledge seems increasingly to have replaced capital or simple labor as a source of wealth. This challenge too reveals strengths of Marxist theory. Marx was eloquent on the growing centrality of knowledge as a productive resource (see most notably Marx 1973: 704 ff.). Marxists point out that in reality the vast bulk of knowledge workers can produce nothing without access to capital and without subordination to the wage relation (either directly or as ostensibly independent contractors). And Marxist theory provides fruitful ideas for studying the challenges confronting capitalist firms in assuring the effectiveness of these knowledge workers (see e.g. Adler 2001; Smith 1987).

Finally, skeptics often attack Marxism for its failure to acknowledge real progress under capitalism. Over the past century or so, albeit with ups and downs and great unevenness across regions, capitalist development has brought rising standards

of living and education, improved mortality and morbidity, growing capacity to communicate and travel, increased opportunities for individual self-development and expression, and less autocratic forms of organization. This progress is visible in both the capitalist center and in imperialism's effects on the periphery (Warren 1980). But Marxist scholarship is partisan: it is constantly seeking to highlight the problems of capitalism and to show why these problems cannot be satisfactorily resolved without fundamental change in social structure. This partisanship tends to blind Marxists to the progressive effects of capitalist development.

If Marxists often fall into this polemical trap, it is also because they often shy away from the technological determinism implied by Marx's view of the role of the forces of production in historical process, and as a result they reduce Marxism to class struggle (Adler 2007). A small but persistent current within Marxist sociology has attempted to restore a richer version of Marx (see e.g. Hirschhorn 1984; Kenney and Florida 1993; Van der Pijl 1998; Warren 1980). I have called this current 'paleo-Marxist' to signal ironically the contrast with the more recent 'neo-Marxist' interpretations. This paleo-Marxism goes back to Marx's argument that class struggle is itself conditioned by a deeper contradiction—that between the progressive socialization of the productive forces and the persistence of capitalist relations of production. This version of Marx has little difficulty making sense of progress under capitalism without abandoning its radical critique.

## 4.4. MARXIST ORGANIZATION STUDIES

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This section highlights some key features of Marxist organization studies, reviewing in turn research focused on the organization level, then on the broader context beyond the organization. Space limitations preclude a detailed review of this literature (in particular, I focus on English-language publications and I do not discuss Marxist analyses of specific forms of organization nor specific categories of workers); but within each subsection we can identify the main arguments and distinguishing features of Marxist versus non-Marxist approaches and of paleo-versus neo-Marxist versions.

### 4.4.1. Organizations

Marxist research on organizations has focused primarily on the conflictual aspects of the employment relation, and the ramifications for the structure and functioning of organizations. Marxist organization studies are thus counterposed to

traditional functionalist, organicist conceptions of organizations and society and to scholarship that obscures the fundamental divergence of interests that shapes organizations. Marxist theory is not alone in its focus on conflict; the distinctive feature of the Marxist approach is in attributing the deep cause of this conflict to exploitation rather than to domination by authority as argued by writers such as Weber and Dahrendorf (see Clegg and Dunkerley 1980; Thompson and McHugh 2002: 365–70). Where the neo-Marxists make this conflictuality foundational, the paleo strand argues that it coexists with cooperation in a contradictory unity. The sections below sketch the main dimensions of this field of research.

#### 4.4.1.1. *Work, Skills, and Learning*

Marx offers a powerful transhistorical ('anthropological') theory of human activity in general and of productive activity in particular. In analyzing capitalist work organizations, Marx adds to this abstract account more 'concrete' layers of determination associated with the specific mode of production; but the anthropological substratum of his theory is fruitful too.

For Marx, the prototypical activity is a practical rather than contemplative engagement with the world around us. Marx's understanding of practical activity is very close to Dewey's (as argued by Hook 2002). In Marx's account, human activity is distinctive in its reliance on tools, both concrete and symbolic. The object of our activity is not a simple brute empirical fact, a mere 'stimulus' to our 'response'; but nor is it merely in our heads. It is a material reality; but our relation to this reality is always mediated by the material tools, abstract concepts and theories, and human desires that we bring to the situation. Productive activity is further distinguished by its collective character, so the individual's relation to the object of activity is further mediated by that individual's relation to the collectivity.

This understanding was developed by the Soviet psychologists (Vygotsky 1962, 1978; Luria 1976; Leont'ev 1978; see also Cole 1996). The resulting Marxist version of 'practice' theory affords useful insights into the nature of work, skills, and learning. Recently these have been developed by Lave (1988) and Wenger (1998), and by a current of research known as cultural-historical activity theory (Engeström 1987, 1990; Engeström, Miettinen, and Punamaki 1999; Sawchuk, Duarte, and Elhammoumi 2006).

This perspective gives us a fruitful way to understand some key changes in workers' skills. In its pre-capitalist form, skill was largely tacit; working knowledge was deeply local; it was learned in intimate apprenticeship as a farmer or artisan. Under advanced capitalist conditions, skill requires the internalization of a much larger universe of accumulated knowledge; but this knowledge has become increasingly scientific and thus far more explicit and less exclusively tacit, making society's accumulated knowledge available to vastly greater numbers. Skills are therefore no longer formed by intimate apprenticeship, but by more rigorously

managed skill-formation processes. On the one hand, as neo-Marxists argue, the real subordination of labor to capital leads to the narrowing of craft workers' skills; on the other hand, as paleo-Marxists argue, skills are deepened and socialized in this process. Innovation is similarly socialized: what was once a highly localized and embedded process relying on tacit knowledge becomes a formalized, globally dispersed process based on a mix of tacit and explicit knowledge—a mix in which the explicit component grows exponentially (Adler 2001; Miettinin 1999; Miettinin and Hasu 2002).

#### 4.4.1.2. *Exploitation and Control*

Given the key role of exploitation and conflict in Marxist theory, control naturally becomes central to Marxist research on organizations. Control is a central theme in a broad range of studies of work organization; but Marxist theory insists that the transhistorical, generic problems of control that arise in any collective endeavor take on a distinctive form in capitalist enterprise, since control here is in the interest of capitalist exploitation.

Braverman (1974) inaugurated a wave of explicitly Marxist-inspired research on control. Braverman identifies Frederick Taylor as the apostle of the real subordination of labor to capital, and on this foundation draws a compelling portrait of the deskilling and degradation of work in the twentieth century: how modern technology and organizing techniques are deployed as tools of control and exploitation of manual, service, and clerical workers. A considerable body of case studies and ethnographies illustrate Braverman's thesis (see e.g. Zimbalist 1979; Graham 1995). Braverman's work on control also inspired a considerable body of Marxist research on accounting (see Tinker 1991, and various papers in the journal *Critical Perspectives on Accounting*).

Braverman's landmark study has attracted criticism in proportion to its prominence (see e.g. Thompson 1989; Thompson and Warhurst 1998; Wardell, Steiger, and Meiskins 1999; Warhurst, Grugulis, and Keep 2004; Wood 1982). Neo-Marxist criticisms focus on restoring the centrality of ongoing class struggle against capitalist control efforts. Several such critics point out that Braverman ignores workers' resistance, and that managers have an alternative to deskilling in 'responsible autonomy', which is particularly attractive where workers' resistance is strong (Friedman 1977). The outcome is perhaps therefore not a trend towards deskilling and ever-greater managerial control, but instead historically contingent and regionally particular (Edwards 1979; Littler and Salaman 1982; Wood 1982). Other sympathetic critics argue that Braverman's account misleads by ignoring other dimensions of differentiation, such as gender and race, and by ignoring the social construction of skill categories.

Braverman retains Marx's premise that capitalist development—damaging though it may be to workers' well-being—increases social productivity (at least,

until the capitalist system reaches its apogee). Other neo-Marxists go further: Marglin (1974) and Stone (1973) argue that, even in the early phases of capitalist development, which saw the replacement of inside contracting with the managerial authority of the wage system, productivity was sacrificed to assure greater social control over the workforce.

The paleo-Marxist critiques of Braverman are somewhat different (Adler 2007). They build on Hyman's (1987) argument that management is caught between contradictory imperatives—needing workers who are simultaneously 'dependable' and 'disposable' (see also Cressey and MacInnes 1980). The paleo strand critiques Braverman's deskilling thesis: it embraces the evidence of a long-term skill upgrading trend in the workforce as a whole, seeing in this trend confirmation that capitalism has continued its historic mission of socializing the (subjective) forces of production. It therefore sees managerial control systems as internally contradictory, functioning both as tools of coordination and means of exploitation.

#### 4.4.1.3. *Technology*

The field of organization studies has long been interested in the relative influence on work organization of technological factors and social factors. The ideological stakes are, of course, high: the most apologetic of mainstream sociology explains away many obnoxious features of the status quo as inevitable corollaries of modern technology. Contingency theory abstracts from this polemic to erect a general theory. In opposition, neo-Marxists insist that technology choices strengthen capitalist exploitation and control (e.g. Braverman 1974; Levidow and Young 1981). The neo-Marxist diagnosis can be reached in either of two ways. First, it is sometimes argued that the implementation of technology and its effects on social structure are socially determined: technology is typically flexible enough to ensure that capitalist-dominated implementation choices will effectively enhance this class domination. Second, moving upstream, technological design itself can be seen as mainly shaped by the dominant social forces (Mackenzie and Wajcman 1985; Noble 1984): at the limit, some neo-Marxists argue that technology is nothing but the material condensation of the prevailing relations of production.

Where neo-Marxists argue that capitalists adapt technology to the imperatives of control, the paleo approach argues that competition among capitalists deprives individual firms of such strong influence over their technology choices and forces them to adapt to the evolving technology frontier, even where this undermines their control (Hirschhorn 1984; Adler and Borys 1989). Both variants of Marxism argue that the capitalist system under-invests in some technologies that would be socially useful but unprofitable for private firms and over-invests in other technologies that boost private profits but are socially harmful. Marxist research on these themes has been influential not only in studies of manufacturing technologies but also in the Information Systems field (overview in Richardson and Robertson 2007).

#### 4.4.1.4. *Ideology*

Ideology is, in the Marxist view, another key means of control, an instrument of class struggle. It is this anchoring of ideology in material interests that distinguishes the Marxist approach. Left-Weberians such as Bendix (1956) develop a critique of managerial ideology that shares some points with Marx; most Weberians, however, reject Marx's materialism in favor of a more contingent view of the relation between the material and ideational realms. Marxist approaches differ even more sharply from the resolutely culturalist approaches found in Durkheim-inspired neo-institutionalist theory, where 'institutional logics' as disembodied ideas possess world-shaping causal power (see also Levy and Scully 2007). Barley and Kunda's account (1992) is more compatible with a Marxist approach, showing the causal link between the condition of the economy and the predominance of rationalist versus commitment discourses in management literature.

Ideology is also important as a form of control at the organization level (Clegg 1981). Burawoy (1982, 1985) extends the traditional understanding of ideology as a societal-level phenomenon to the organizational level, exploring the ideological mechanisms buttressing class control within the firm and plant. A sizeable Marxist-inspired literature critiques corporate efforts to use participation and teamwork ideologies to undermine worker solidarity and union organization (Barker 1993; Fantasia 1995; Fantasia, Clawson, and Graham 1988; Grenier 1988; Grenier and Hogler 1991; Hales 2000). Research on emotional labor shows how capitalist ideology can reinforce control by shaping deeper aspects of self-consciousness (Hochschild 1965). The paleo-Marxist approach modifies the critique, arguing that practices such as teamwork, participation, and emotional labor have a dual character because they also represents a real advance in the productive forces insofar as workers learn to deploy a broader range of their personal capabilities in production activity and they learn to master the social-interactional and emotional dimensions of work (e.g. Lopez 2006).

#### 4.4.1.5. *Workers' Responses*

Marxist organization studies have naturally devoted considerable attention to workers' responses to control and exploitation. Three responses have garnered most of the attention: alienation, consent, and resistance. I review them in turn.

A large proportion of the references to Marx in the sociology literature are in the context of discussions of *alienation*. In much of this literature, alienation is not strongly tied to Marxist theory, ignoring Marx's point that subjective feelings of alienation are the inevitable counterpart of the workers' objective alienation, expressing the structure of relations of production that deprive workers of control over the ends and means of work activity (Jermier 1985). As much of this sociological literature defines it, alienation can just as easily be the result of inevitable loss of individual autonomy in large-scale organization of any kind, rather than the

specifically capitalist kind, or may be the result of an interpersonally inconsiderate style of managerial supervision, or may indeed be an intrinsic feature of any kind of instrumental work as distinct from free activity. Arguably, the real experience of alienation represents the concatenated effects of all of these; but Marxists highlight the different causal roles of each in explaining the observed patterns.

*Consent* is a second key response to capitalist control and exploitation. Noting the frequency of consent, Burawoy (1982) sees the task of Marxist organization studies as turning managerialist organization-behavior research on its head: instead of asking why workers do not work harder, we should be asking why they work as hard as they do. Burawoy argues that consent is created by ensnaring workers in activities—‘games’—that encourage work effort (securing surplus labor) while camouflaging the underlying exploitation (obscuring, mystifying surplus labor). He identifies three main forms of these games: on the shop-floor, games around piecework are partially psychologically fulfilling; in careers, promises of promotion in internal labor markets pit workers in competition against each other; and in collective bargaining, workers have the illusion of negotiating power. In each case, these games provide workers with just enough feeling of choice to ensure their consent.

In understanding these political and ideological processes, Burawoy makes effective use of Gramsci’s (1971) concept of hegemony. Hegemony helps explain how consent may signify neither acceptance nor legitimacy: it is not necessarily normative in the sense of strongly internalized values; it is typically a mix of acquiescence, internalized ideology, and coercion (see also Sallach 1974). This acquiescence pacifies the workplace, but does not create solidarity between workers and managers.

Neo-Marxist critics of Burawoy point out that these games often function to workers’ real material advantage (Clawson and Fantasia 1983; Gottfried 2001). Conversely, paleo-Marxists are concerned that Burawoy exaggerates the importance of ‘obscuring’ surplus value. His analysis seems to assume that were it not for these ‘games’ in the workplace, workers would have long ago seen the truth of capitalism and overthrown it. In contrast, Marx’s own analysis emphasizes the role of structures beyond the workplace, most notably the labor market itself, in reproducing labor’s subordination.

As for the third basic type of response—*resistance*—the key starting point for Marxist analyses of resistance is the collective nature of the modern labor process (Hyman 1975). Fantasia (1995), for example, shows that wildcat strikes are more common where the labor process requires workers to coordinate closely, on a moment-by-moment basis, and where as a result, it generates strong work-group solidarity. Resistance under these conditions is not a matter of individuals struggling for personal ‘recognition’ or ‘autonomy’ (Mumby 2005). However, resistance does not necessarily take a revolutionary form: while unions can more easily find root in this collective labor process than in a dispersed labor process, unions are



under great structural pressure to focus on negotiations within capitalism's constraints and not to contest those constraints (Martin 2007).

Unions are, of course, not the only possible vehicle for resistance. Ackroyd and Thompson (1999) discuss a broad range of oppositional misbehavior (see also Jermier, Knights, and Nord 1994). Workers appear to be increasingly oriented to the legal system to express their grievances (Kelly 2005). Whistle-blowing has emerged as a new form of worker resistance (Rothschild and Miethe 1999). Hodson (2001), inspired partly by Marx but taking his distance for the neo-Marxist reading that sees only the conflictual aspect of the employment relation, draws a portrait of workers' efforts to establish 'dignity' at work. Hodson argues that threats to workers' dignity are created by mismanagement and abuse, overwork, illicit constraints on autonomy, and manipulative forms of employee involvement. Workers assert their need for dignity with a mix of resistance behaviors, organizational citizenship, independent meaning systems, and group relations.

#### 4.4.2. Beyond the Organization

Much of mainstream organization studies focuses on the individual organization and sees it purposively adapting to competitive pressure. Relative to this body of work, Marxists advance some of the same critiques as population ecology, neo-institutionalism, and resource-dependence theories, and highlight the broader social forces that act on and through organizations. However, relative to these other approaches, Marxism is distinctive in highlighting the way both the broader environment and the organization are structured by class relations and conflict. This can be seen in research in several fields discussed below.

##### 4.4.2.1. Corporations and Inter-corporate Ties

One important focus of Marxist research has been the fabric of inter-corporate ties created by ownership and interlocking directorates. 'Organization-centric' studies see these inter-corporate ties as expressing the instrumental rationality of firms. Marxists, on the other hand, are more sensitive to the underlying commonality of class interests that guide these firms, and therefore see these ties as reflecting the internal factional structure of the capitalist class. As such, they are the means by which the capitalist class achieves collective action, even though this achievement is often undermined by competitive rivalries (Useem 1982).

The capitalist class also demonstrates its cohesion without the benefit of formal inter-corporate ties. Several studies have shown the ability of the capitalist class to achieve collective action on political issues that could have split it if capitalists attended only to their individual economic interests (Domhoff 1983; Mizruchi 1989; Ornstein 1984; Palmer and Barber 2001; Whitt 1979). Levy and Egan (2003) use

Gramsci's notion of hegemony to characterize corporations' collective political strategies in the environmental arena.

#### 4.4.2.2. *Production Networks*

Organizational researchers have paid considerable attention over the past couple of decades to the importance of industrial districts and other productive ties among clusters of firms. While some of this work has had Marxist roots (see Raikes, Jensen, and Ponte 2000), other scholars' approaches are explicitly anti-Marxist, in arguing that Marx's prognosis of growing centralization and concentration of capital is belied by the continued vitality and purported resurgence of networks of small firms (e.g. Lazerson 1995; Piore and Sabel 1984). Much of this latter literature is reminiscent of Proudhon's thesis that advanced automation would lead to the reconstitution of craft—which recalls in turn Marx's critique of Proudhon's celebration of craft idiocy. Other research in this area restores Durkheim's insight concerning the importance of the non-contractual elements of contract (e.g. Dore 1983).

By contrast, neo-Marxists point to the domination of these networks by large corporations (Harrison 1994; Sacchetti and Sugden 2003) and the way firms use their make or buy decisions to assert power over both 'partner' firms and their own employees (Grimshaw and Rubery 2005). The paleo view highlights the progressive socialization of production implied by the creation of denser networks of collaborative inter-firm ties: notwithstanding their asymmetries, these ties represent the substitution of planned coordination for the anarchy of the market (Adler 2001). Consider, for example, the huge productive efficiencies wrought by Wal-Mart in its supplier network. The bad side is clearly visible in the impoverishment of numerous small-scale, locally focused firms, with negative effects on many communities. On the other hand, the traditional supply chains in this industry were technologically backward, charged exorbitant prices, and offered very variable quality. The concentration wrought by Wal-Mart now offers consumers lower prices and affords social forces an opportunity to push the policies of Wal-Mart and its suppliers in a progressive direction—an opportunity never available when the industry was previously so dispersed (see also Levy 2008). Wal-Mart reminds us of Marx's dictum that history often progresses by its bad side (Marx 1955: 132).

#### 4.4.2.3. *Imperialism/Globalization*

Marxist ideas have played an important role in shaping mainstream research on multinational corporations. This is in large part due to the influence of the work of Hymer (see Cohen *et al.* 1979). Hymer argued that, as Marx predicted, firms would serve as the vectors of imperialist expansion, and in the process these multinational corporations would grow in scale and scope. Subsequent work has nuanced his

analysis, showing that the asymmetries of power between the headquarters in the imperialist center and the subsidiaries in the periphery regions have developed along several different paths: the 'global' form assumed by Hymer now coexists with multi-domestic and transnational forms (see review by Tolentino 2002).

On mainstream readings, the transnational model offers the prospect of overcoming the uneven nature of capitalist development, by turning subsidiaries into 'centers of excellence' and thus overcoming the gap between developing and developed economies. Neo-Marxists are skeptical of any perspective that ignores the profound power and wealth asymmetries that persist and the new ones that capitalism engenders. Paleo-Marxists share this skepticism, but are sensitive to the progressive socialization driven by these multinational firms—the productivity benefits, the broadening of people's habitual cognitive frames, the considerable opportunities for women's advancement, and the unprecedented opportunity to exercise social pressure and regulatory controls. Merk (2005), for example, analyzes how the globalization of the athletic footwear production process creates a global collective worker, how this has prompted the emergence of new, globalized forms of struggle, and how this, in turn, has led to new, globalized forms of regulation for the industry.

More broadly, recent Marxist-inspired research in world systems theory has pointed to the likelihood that US global hegemony is in decline, and in this process, is shifting its economic base from production to finance (Arrighi 1994). Marens (2003) points out that this 'financialization' has important implications for the corporate form: the 'nexus of contracts' view of corporate governance becomes a natural way to view the corporation once it leaves the struggle to create exchange-value by producing use-values and enters the world of speculative finance and what Marx called 'fictitious' capital (i.e. paper claims that lacks material collateral) (see also Aglietta and Rebérioux 2005; Harvey 1982).

#### 4.4.2.4. *Capitalism and the Environment*

Marxism has been influential in the growing community of scholars studying the relations between capitalism and environmental degradation (see various papers in the journal *Organization and Environment*). The essential Marxist insight is that a system predicated on the accumulation of capital has no internal self-control mechanisms that can assure a sustainable 'metabolic interaction' between human beings and the earth (Foster 2000; Burkett 1999). An economic structure predicated on private property relegates environmental concerns to the status of externalities, so only government intervention could restore the balance. However government itself is dominated by capitalist class interests, and even if the long-term collective interests of this class argue for greater environmental responsibility, internal rivalries within that class constantly undermine regulatory efforts. Individual corporations may attempt to win competitive advantage by announcing their commitment to sustainability; but such gestures, even when they are not pure 'greenwashing'

(Jermier, Forbes, Benn, and Orsato 2006), are by nature sporadic and incapable of redirecting the entire pattern of economic growth. So long as environmental threats are only localized, this constitutional deficiency of capitalism is tolerable; but as these threats multiply, capitalism endangers the entire planet, and it becomes increasingly obvious that our survival depends on replacing capitalism with a more evolved mode of production.

#### 4.4.2.5. *Alternatives to Capitalism*

Marxist theory has an ambiguous relation to efforts to specify alternatives to capitalism. On the one hand, Marx's analysis of capitalism as compared to feudalism and other modes of production suggests some specific features of the future higher form of society. These include the subordination of the market to some form of democratic planning at the national and regional levels, and the subordination of corporate bureaucracy to some kind of democratic governance at the enterprise level. On the other hand, Marx argued that efforts to predict the details of such a form of society were futile (since these details would have to be invented through experimentation) and a distraction (since revolutionary mobilization arguably has more to do with anger at past and present injustices than enthusiasm for this or that blueprint for the future).

Marx acknowledged, however, the interest of experiments in cooperatives—even if it was difficult to see how islands of socialism could sustain themselves in a broader sea of capitalism—and Marxist studies of cooperatives have yielded rich insights into the possibilities of a form of organization radically superior to the wage relation (Jossa 2005; Rothschild and Russell 1986; Rothschild-Whitt 1979; Warhurst 1998). Marxist theory has also informed research on work organizations in the socialist bloc (see Burawoy 1985, 1989; Stark 1986) and in the transition from communism to capitalism (Burawoy 2001).

## 4.5. MARXISM IN DIALOGUE WITH OTHER APPROACHES

The most common Marxist criticisms of mainstream organization studies are that they are too often static rather than dynamic; they are functionalist rather than dialectical; they privilege consensus and present conflict as pathological; they take as their unit of analysis individuals, groups, or organizations, and abstract from class. For Marxists eager to show the historical impermanence of the capitalist order, these are important handicaps: these biases encourage us to see the prevailing

social order as natural and inevitable (Benson 1977; Burawoy 1982; Goldman and Van Houten 1977; Zeitz 1980). With this general orientation, Marxists have engaged several other theoretical traditions in constructive dialogue. The following paragraphs review these in rapid summary.

Weber rejected Marxism's materialism; but the two traditions are joined in the critique of capitalism's structure of domination, its substantive irrationality, and the alienation implied by the rule of formal rationality (see e.g. Thompson and McHugh 2002: 370–4). The literature on the Marx–Weber relation is already enormous, and that relation continues to provoke valuable research. Like much of Western Marxism, the Frankfurt School (Horkheimer, Adorno, Marcuse, Habermas, etc.) focused on cultural factors to explain the failure of socialist movements to effect systemic change, and to this end, built a fruitful synthesis of elements of Marx and Weber—albeit relinquishing key elements of Marxist theory in the process.

Durkheim has been a powerful influence in organization studies, as visible in the work of Granovetter on the embeddedness of markets, Sabel on development associations, Streeck on associative orders, neo-institutionalists such as Meyer, Powell, and DiMaggio on normative isomorphism's pervasive effects on organizations (as pointed out by Burawoy 2001). Durkheim's earlier work on the division of labor has important convergences with Marx on socialization as interdependence (see Cleghorn 1987; Giddens 1976; Lukes 1973; Stone 1952). His later work rejects Marx's materialism, and Marxists argue that the resulting stream of research affords far too much autonomous causal weight to disembodied values, norms, ideas, and logics. Durkheim-inspired research offers a useful corrective to commodity fetishism in showing how economic relations are typically embedded in social relations; in doing so, however, many contemporary scholars in economic sociology largely accept mainstream economic theory's characterization of economic relations, even if they insist on contextualizing these; Marxists offer a deeper critique of economics, by revealing the contradictory social relations at the heart of economic relations.

Pragmatism has close affinities to Marx's conception of practice as a tool-mediated transaction with the external world. The main difference is that pragmatism has no theory of the broader social context. As pragmatism grew into symbolic interactionism, its proponents increasingly presented this lack as a virtue, and the dialogue with Marxism grew more strained. Convergence is, however, reemerging, as theories of practice and research on the role of artifacts in practice reopen questions about the relations between local activity and the broader social context.

Many feminists, students of race and ethnicity, and other sociologists who study organizations empirically find that identities and projects are more powerful than class structure in explaining change at this level of analysis. They are surely correct to criticize doctrinaire Marxists who refuse to accord non-class dimensions of social structure any relevance; but this leaves entirely open the question of the place of

these latter dimensions in the broader, longer term sweep of history. Calás and Smircich (2006) outline a large family of feminist approaches to organization studies that articulate different answers to this question. Their discussion of ‘socialist feminism’ summarizes some of the key debates and insights associated with the Marxist tradition within feminism. (The earlier literature is reviewed by Thompson 1989; Hartmann 1979.) A key contribution of feminist work to the Marxist project has been to challenge facile partitions erected by theorists between the realms of production and reproduction. Feminists have argued that the production process presupposes a reproduction process, that differences between women and men in the latter explain differences in the former (see e.g. Acker and Van Houten 1974; Acker 2000; Cockburn 1991; Game and Pringle 1984; Kanter 1977; Reskin and Ross 1992; Smith 2002; Wajcman 1998). Feminist work has also had a fruitful dialogue with Marxism in the study of technology and the organization of both wage work and domestic work (Wajcman 2004). Moreover, feminism has been an arena in which crucial epistemological debates have unfolded. From the Marxist point of view, the most important of these has been around ‘standpoint theory’ (see Anderson 2003; Harding 2004). Standpoint theory generalizes an argument originally advanced by Marx and later elaborated by Lukács (1971), that all social theory implicitly adopts a social vantage point, and that our theories will be deeper and more useful to an emancipatory project if as theorists we adopt the standpoint of the subaltern (Adler and Jermier 2005).

## 4.6. TO CHANGE THE WORLD

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Marxism formulates a particularly sharp critique of the aims of much mainstream organization research to inform management action in the service of shareholder wealth. Such a starting point leads researchers to ignore, downplay, or distort the concerns of employees or society at large (Nord 1977). While some of this work is inspired by genuine humanist impulse to reform management, its starting point limits the depth of analysis.

Other mainstream research aims to be value-neutral and takes its distance from the practical needs of any actors. Such approaches too can generate powerful critical insights; but arguably this approach is self-defeating, since no science can in fact be value-neutral, and the aspiration of value-neutrality can easily obscure implicit value positions. Marxists argue that it is more productive to take a stand in favor of the emancipation of the oppressed, and then work to ensure one’s research is as rigorous and objective as possible (Adler and Jermier 2005; Frost 1980; Victor and Stephens 1994).

Looking forward, perhaps one of the main opportunities for the development of Marxist organization studies lies in strengthening its public engagements. Burawoy (2004) distinguishes mainstream and critical sociology, and their respective academic and non-academic audiences. Mainstream 'policy sociology' turns 'professional sociology' (mainstream academic research) towards actionable knowledge that can support the technocratic efforts of policy makers. Likewise, Burawoy argues, 'public sociology' can turn 'critical sociology' away from an exclusive focus on internal debates within the field and towards public dialogue in support of struggles for emancipation. Such public dialogue can take more traditional forms (books that stimulate public reflection and opinion columns that address current issues) or more 'organic' forms (see Gramsci 1971) that engage directly with specific communities and social movements. Marxist scholars in many fields have often been engaged in work of this public kind. However, even though organization studies has enormous potential relevance to a range of publics, Marxists in this field have rarely taken up the public sociologist role. With the development of new oppositional movements, opportunities for such engagement seem to be multiplying.

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