



PERSPECTIVE

The Sociological Ambivalence of Bureaucracy: From Weber via Gouldner to Marx

Paul S. Adler

Department of Management and Organization, Marshall School of Business, University of Southern California,
 Los Angeles, California 90089, padler@usc.edu

Reports of the demise of the bureaucratic form of organization are greatly exaggerated, and debates about bureaucracy's functions and effects therefore persist. For many years, a broad current of organizational scholarship has taken inspiration from Max Weber's image of bureaucracy as an "iron cage" and has seen bureaucracy as profoundly ambivalent—imposing alienation as the price of efficiency. Following a path originally sketched by Alvin Gouldner [Gouldner, A. W. 1954. *Patterns of Industrial Bureaucracy*. Free Press, Glencoe, IL], some recent research has challenged this view as overly pessimistic, arguing that bureaucracy need not always be coercive but can sometimes take a form that is experienced as enabling. The present article challenges both Weber's and Gouldner's accounts, arguing that although bureaucracy's enabling role may sometimes be salient to employees, even when it is, bureaucracy typically appears to them as ambivalent—simultaneously enabling and coercive. I offer an unconventional reading of Marx as a way to make sense of this ambivalence.

Key words: bureaucracy; Marx; ambivalence; socialization

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1. Introduction

The last few years have seen signs of resurgent interest in bureaucracy (du Gay 2000, 2005; Olsen 2005, 2008; Courpasson and Reed 2004; Greenwood and Lawrence 2005). This revival has been driven by several factors. First, there has been mounting concern that the replacement of bureaucracy by markets or social networks—as encouraged by critics of bureaucracy such as Osborne and Gaebler (1992) and Peters (1992)—risks losing some of the important benefits of bureaucracy, benefits not only for operational performance and technical reliability (e.g., Bigley and Roberts 2001), but also for the welfare of employees, clients, and the broader public (Briscoe 2006, du Gay 2000, Goodsell 1994). Second, predictions of the disappearance of bureaucracy (e.g., Heckscher and Donnellon 1994) have proven off the mark: bureaucratic structuring is still very prevalent in both the private and public sectors (Alvesson and Thompson 2006). Indeed, bureaucratic rationalization is accelerating in some sectors that so far have resisted it, such as professional services (Cooper et al. 1996) and health-care delivery (Adler et al. 2008); it is taking root in unexpected places, such as open source initiatives

(e.g., Butler et al. 2008, O'Mahoney and Ferraro 2007); and it has been further stimulated and legitimated by the emergence of international standards such as ISO 9000 (Brunsson and Jacobsson 2000).

This resurgence has renewed interest in a long-running debate concerning bureaucracy's functions and effects. The debate concerns bureaucracy in the broad sense, defined by Weber as a general form of organization, not just government agencies or managerial staffs. For several decades, this debate had settled into a stand-off between those who celebrated bureaucracy's technical advantages and those who critiqued its human consequences—embodying the enduring split between "rational" and "natural" system views in organizational theory (Scott and Davis 2007). These two views represent the two sides of Weber's pessimistic ambivalence: bureaucracy, Weber argued, is an "iron cage" that affords a level of efficiency that modern society cannot do without, but it achieves this efficiency only at the terrible price of alienation (Weber 1958).

Recently, a current of research has sought to move beyond this pessimism by challenging the assumption

that bureaucracy typically has negative effects on motivation and the meaningfulness of work. To buttress its challenge, this current has sought to revive a thesis—advanced earlier by Gouldner (1954)—according to which bureaucracy could take different forms that are experienced differently by employees. As argued by Adler and Borys (1996), bureaucracy is often a ceremonial mask (Gouldner’s “mock” form) or a coercive weapon (in the “punishment” form), but it can also function as an enabling tool (in the “representative” form). Subsequent research in this vein has explored various ways in which these forms could be differentiated empirically in settings as diverse as hospitals (Kwon 2008, Meirovich et al. 2007), schools (Sinden et al. 2004), restaurant chains (Ahrens and Chapman 2004), logistics departments (Wouters and Wilderom 2008), and software development (Adler et al. 2005).

The present paper is motivated by the concern that neither Weber’s nor Gouldner’s perspective is entirely satisfying because neither can account satisfactorily for situations where bureaucracy is experienced by employees as *simultaneously* enabling and coercive. Consider, for example, a case cited by Adler and Borys (1996)—the lean production model as exemplified by the Toyota production system (TPS) and as implemented at a unionized automobile assembly plant in California (NUMMI). Adler and Borys (1996) portray NUMMI as a highly bureaucratic organization and present the “standardized work” component of lean production as a prototypical example of the enabling form of bureaucracy. They argue that prior to NUMMI’s creation, when the plant was managed by General Motors using a coercive form of bureaucracy, workers had exhibited all the classic signs of alienation. In contrast, now that the plant was operating under NUMMI’s TPS regime, workers were considerably more engaged because Toyota’s standardized work procedure facilitated workers’ efforts to assess alternative work methods and to standardize and formalize the most efficient of these methods. Workers collaborated in this procedure because they appreciated—and typically reciprocated—the trust invested in them by the new managers, and because they saw this procedure used to productive ends. However, Adler’s (1993) interviews with NUMMI workers show that workers in fact responded ambivalently to the standardized work procedure, because it also led to intensified work. On the positive side, one worker commented,

Standardized work means that we all work out objectively the best way to do the job, and everyone does it that way. . . . I follow the procedure we’ve laid out because it makes sense. . . . The great thing about standardized work is that if everyone is doing the job the same way, and we run into a problem, say a quality problem, we can easily identify where its coming from and fix it. If everyone is doing the job however they feel like, you can’t even begin any serious problem-solving.

(Adler 1993, p. 145)

On the negative side, a colleague of the first worker said,

Standardized work is a joke as far as I can see. We’re supposed to go to management and tell them when we have extra seconds to spare. Why would I do that when all that will happen is that they’ll take my spare seconds away and work me even harder than before? I’d rather just do the job the way I’m already comfortable with. At GM, we were given a task and if we finished it earlier than we were supposed to we got to rest. At NUMMI, they’ll try to shove more work at you. I’m no fool.

(Adler 1993, p. 146)

Individually, these workers’ views diverged; collectively, these divergences represent ambivalence of the workers taken as a group (in the sense that public opinion analysts talk of the public’s ambivalence; see, e.g., Cantril and Cantril 1999). This ambivalence is not quite the one expressed by Weber: the positive side does not just acknowledge that bureaucracy is the condition for continued employment and wages, but rather it expresses an active embrace of bureaucracy as a tool that enables workers to achieve collective goals they share; the negative side does not express frustration with a lack of opportunities for individual initiative, but rather resistance to what was perceived as a deeper injustice. Nor is this ambivalence the one Gouldner might expect: it is not the case here that bureaucracy has been implemented in a haphazard manner and that, as a result, some policies, some aspects of the bureaucratic structure, or some parts of the organization function coercively while others function in an enabling manner; here, one and the same policy is seen as having simultaneously contrary effects. A question is therefore posed: Why, even where a specific bureaucratic structure or policy is experienced as enabling, is it also experienced as coercive?

The ambivalence of NUMMI workers is far from unique. Similar ambivalence is documented in several others studies of lean production (Ezzamel et al. 2001, Levesque and Cote 1999, Lewchuck and Robertson 1996, Shadur et al. 1995, Wickens 1993). Moreover (as discussed further below), much the same ambivalence is found across studies of organizational bureaucracy in other forms, such as ISO 9000 (e.g., Boiral 2003) and the rationalization of software development (Adler 2006).

I take this recurrent pattern to be evidence that we are dealing with an ambivalence that is not only psychological but also sociological. *Psychological ambivalence* inheres in the individual: it is a function of individual differences in psychological reactions (e.g., Lewicki et al. 1998, Oglensky 1995, Piderit 2000). In contrast, *sociological ambivalence* inheres in the social structure: here, the source of ambivalence is the incompatible normative expectations of attitudes, beliefs, and behavior assigned to a position by an internally contradictory social structure (Merton 1976). Sociological ambivalence can explain both the statistical likelihood of individual, psychological ambivalence (such as expressed by

the software developer I quote below) and the enduring pattern of divergent responses among people situated similarly in the same social structure (such as the two NUMMI workers quoted above).

The puzzle here is not about psychological ambivalence: there are many theories that could explain why individual employees might feel ambivalent about working in such settings or indeed about working at all. March and Simon (1958) delineate several situational factors within and across organizations that can lead individuals to feel ambivalent about their decisions to participate and to produce. The puzzle is rather, what is it about enabling bureaucracy itself that leads to such a recurrent pattern of ambivalence in employees' responses? The answer matters—much of our understanding of modernity and many of our organization design prescriptions hinge on it.

The sociological ambivalence of bureaucracy for NUMMI workers and for employees in other settings where bureaucracy takes an ostensibly enabling form is not well accounted for by either Weber or Gouldner; the thesis of the present paper is that this ambivalence can be better explained by Marx. The conventional reading of Marx highlights the importance he accords class conflict and therefore sees him as a fierce critic of bureaucracy and of its coercive effects on employees: there is little ambivalence about bureaucracy in this reading. However, I draw on a different reading of Marx (building on Cohen 1978), one that sees class conflict as shaped by a deeper structural contradiction between the forces and relations of production. On this reading, bureaucracy is itself contradictory because it participates directly in both poles of that structural contradiction. This reading leads to a surprisingly straightforward and fruitful explanation of bureaucracy's sociological ambivalence.

In summary, I argue that bureaucracy in capitalist firms is simultaneously an enabling tool for organizing large-scale cooperation and a coercive weapon for exploitation. These two functions coexist in a kind of paradox—in a relation that Marx calls a “real contradiction” (see Bottomore 1991, pp. 93–94). This contradiction is not static: the pressures of capitalist competition force firms constantly to seek to refine bureaucracy's tool function, even though these same pressures constantly push firms to use bureaucracy as a weapon and thereby undo the collaboration this productive function requires. Under such conditions, even when bureaucracy's enabling function is salient to employees, its coercive function does not disappear, and employees in such settings will experience bureaucracy as ambivalent.

The rest of this paper is structured as follows. Section 2 reviews in more detail the prior efforts by Weber and Gouldner to characterize bureaucracy's ambivalence, and suggests that a new interpretation of Marx might provide a more compelling answer. Section 3 explains this new interpretation. Sections 4 and 5 summarize, respectively, the ways bureaucracy functions as a

weapon and as a tool. Section 6 discusses the impact on employees' subjective experience of bureaucracy insofar as it functions as a tool. Section 7 synthesizes this Marxist analysis of the ambivalence of bureaucracy. Section 8 discusses some limitations and extensions of this theory.

2. Prior Theory: Weber, Gouldner, Marx

Our field's long debate over bureaucracy has focused not only on its functions and effects—the present paper's focus—but also on its features and diffusion. Concerning its *features*, older debates focused on whether bureaucracy is a useful concept for empirical research, testing whether bureaucracy's defining features—extensive formalized and standardized procedures, complex structures of specialized roles and departments, differentiated vertical hierarchy and centralized policy making, and substantial staff departments—in fact cohere empirically (Pugh et al. 1969). This literature was recently synthesized by Walton (2005) in a meta-analysis of 64 statistical studies reported in the scholarly literature: he found a high level of covariance among these features. Moreover, Walton found no statistical evidence that this coherence had diminished over the decades that these studies span.

Research on bureaucracy's *diffusion* has been increasingly oriented away from technical explanations and toward neoinstitutionalist ones, encouraged by landmark studies by DiMaggio and Powell (1983) and Meyer and Rowan (1977). This research has either ignored the question of bureaucracy's substantive impact or has highlighted the way some organizations adopt bureaucracy only ceremonially, decoupled from the core activities of the organization.

The present paper focuses on the debate over bureaucracy's *functions* and *effects* within organizations. Debate here has been deeply shaped by Weber and his own ambivalence.

2.1. The Weberian Account

Weber “thought of bureaucracy as a Janus-faced organization, looking two ways at once. On the one side, it was administration based on expertise; while on the other, it was administration based on discipline” (Gouldner 1954, p. 22). Most participants in this debate have focused on one face or the other, reflecting and reinforcing the enduring split in the broader field of organization theory between rational-system and natural-system views (Scott and Davis 2007) and between what Perrow (1973) ironically calls the “forces of light” and the “forces of darkness.”

The more positive, rational-system view of bureaucracy highlights its expertise face and its technical merits. Simon (1976) argues that the principles of bureaucratic structuring facilitate the management of organizational scale and complexity by the hierarchical decomposition of centralized policy setting and decentralized operational decision making. Nelson and Winter (1982) argue

that routines—in the form of both formalized procedures and tacit procedural memory—constitute the essence of organizational competence. Kallinikos (2004) portrays bureaucracy as a technology of organizing whose productive power resides in the way its formalized principles render organizational functioning independent of the personal qualities of the incumbents. Du Gay (2000) highlights the benefits for democratic governance afforded by the bureaucratic ethos of disinterestedness.

On the other hand, a strong tradition of natural-system research has highlighted the disciplinary face of bureaucracy, pointing to bureaucracy's human costs, not only for external clients/subjects but also for employees within bureaucratically structured organizations. Merton (1940) argued that working in a bureaucracy induced trained incapacity, timidity, and rigidity. Crozier (1964) highlighted the dysfunctional political rivalries between specialized subunits. Where Parsons translated Weber's "Herrschaft" as "authority," others have argued it is better rendered as "domination" (Bendix 1960; Cohen et al. 1975; Weber 1968, Note 31, pp. 61–62; Weiss 1983), and Marxists (e.g., Clawson 1980) join left-Weberians (e.g., Salaman 1979) in arguing that bureaucracy's key function is to buttress the domination by employers over employees. Indeed, for Marxists like Clawson, the bureaucratization of industry served no productive purpose at all: its function was entirely to ensure managerial control for intensified exploitation. Humanist critics (e.g., Bennis 1968) have highlighted the coercive functions of bureaucracy, fearing that formally structured larger-scale organizations inevitably curtail individual autonomy and doom employees to psychological alienation. This fear is further magnified by those who invoke Michel's "iron law of oligarchy" (1966) and by those who see bureaucratic staffs as a means of class domination of clients/subjects (e.g., Mouzelis 1968, Wright 1974).

Those seeking a synthesis of these competing views have taken inspiration from Weber's tragic "iron cage" image and from his argument that humanity is condemned to accept bureaucracy's human costs because modern society cannot do without its technical benefits. Katz and Kahn (1978, p. 222) express this understanding of bureaucracy in terms that still reflect the views of many researchers:

[Bureaucracy] is an instrument of great effectiveness; it offers great economies over unorganized effort; it achieves great unity and compliance. We must face up to its deficiencies, however. These include great waste of human potential for innovation and creativity and great psychological cost to the members.

In this view, bureaucracy appears to employees as a painful trade-off between economic security and wage income on one hand and alienating work content and context on the other. Weber's fears of alienation were

driven by a strong commitment to individualism that was informed both by classical liberalism and a certain sympathy with Nietzsche (Schroeter 1985, p. 22ff). More recent natural-system theorists' fears have been shaped by a range of psychological theories that assume a primary need of the individual for autonomy (e.g., Deci 1975, Hackman 1980).

Rational theorists are skeptical of such psychological assumptions. March and Simon (1958), for example, although clinical in their analysis of the risks of structural dysfunctions of bureaucracy, have virtually nothing to say about bureaucracy's alienating psychological effects. The exception is the observation they make in passing that bureaucracy will likely be felt as more constraining in cultures such as the American where an "independence norm" (March and Simon 1958, p. 115) prevails. Even under those conditions, they argue, bureaucracy's poor fit with norms of individual independence can be counterbalanced by loyalties to various collectivities and by individual rewards. For rational-system theorists, bureaucracy may create psychological ambivalence for some people under some conditions, but it creates no sociological ambivalence as such.

2.2. From Weber to Gouldner

As indicated above, a dissenting current in organizational research has argued for a more optimistic synthesis, attacking the natural-system assumption that the human effects of bureaucracy need be alienating and stultifying. This more optimistic path, too, has taken inspiration from some brief notes by Weber (1968, pp. 967–968):

According to experience, the relative optimum for the success and maintenance of a rigorous mechanization of the bureaucratic apparatus is offered by an assured salary connected with the opportunity of a career that is not dependent upon mere accident and arbitrariness. Taut discipline and control which at the same time have consideration for the official's sense of honor, and the development of prestige sentiments of the status group as well as the possibility of public criticism also work in the same direction. With all this, the bureaucratic apparatus functions more assuredly than does legal enslavement of functionaries.

Following this path, Bendix (1947) suggests that bureaucracy has appeared in history in both more democratic and more authoritarian forms: the democratic form is characterized by discretion, mutual respect, and loyalty through camaraderie; the authoritarian form is characterized by obedience, fealty, and loyalty through compliance. Gouldner (1954) argues that bureaucracy could take the three different forms mentioned above—punishment, representative, and mock. The representative form was distinguished by wide participation in the

design and implementation of rules, and by broad consensus over means and ends. Even if the punishment and mock forms were more common, the representative form offered hope that the alienation so often associated with bureaucracy could be eliminated.¹ Blau (1955) builds on Weber's notes to contrast adaptive and rigid forms of bureaucracy in a similar manner. This more optimistic synthesis laid largely neglected for several decades until Adler and Borys (1996) attempted to revive it, and others followed suit.

2.3. The Theoretical Challenge

Both Weber and Gouldner suggest reasons why bureaucracy might be experienced by employees as ambivalent. For Weber, employees might be willing to trade security and income for work conditions that stifle individual initiative, and this would likely leave them feeling ambivalent. Gouldner shifts the frame by arguing that bureaucratic structures can be experienced more positively when they take a more enabling form, and on Gouldner's account, we would expect that real organizations will typically embody of a mix of enabling, coercive, and ceremonial forms of bureaucracy, and this mix would leave employees ambivalent about the overall phenomenon.

We need not deny the power of these two lines of argument to notice that neither offers a compelling account of the cases cited in the introduction above: here, employees feel ambivalent about bureaucracy even where its enabling quality is salient.² Further illustrations can be cited from my study of software developers in a large software services organization operating under the capability maturity model (CMM) (the study is reported in Adler 2006; some interview excerpts below are quoted there). The CMM was inspired by the total quality management model in manufacturing and leads to a similarly rigorous bureaucratic rationalization of the software development process. Like NUMMI, the organization I studied had gone to great lengths to ensure that this process took an enabling character, and indeed some developers embraced this bureaucratization, as suggested by the following interview excerpt:

Developers want above all to deliver a great product, and the process helps us do that. What I've learned coming here is the value of a well-thought-out process, rigorously implemented, and continuously improved. It will really improve the quality of the product. In this business, you've got to be exact, and the process ensures that we are. You have to get out of hacker mode!

On the other hand, some developers felt alienated by this bureaucratization and quit, and some who stayed voiced deep ambivalence:

Programmers like to program. They never like to document. They say: "Why can't I just write the code and if anyone has a problem, let them come and ask me?!" But without process, you're dependent on the people, and

people do leave. If you have a good process, then people become like widgets you can stick into it, and everyone knows what their job is. Obviously that's a big advantage for the organization. And people at a management level usually do see the value of it. Managers know that you don't want to be too people dependent, even if it doesn't benefit Joe programmer. But there's some benefit for the individual programmer too: even if I personally don't like documentation, it makes other people that I depend on more reliable. And if you have staff turnover, the ones who stay on see the value of a less people-dependent process. On the other hand, it also brings some fear for job security. It does make my job as a programmer easier to fill.

2.4. Turning Toward Marx

To account for this sociological ambivalence, I propose that we turn to Marx. Although the conventional reading of Marx appears unpromising in this context, I hope to show that an alternative reading offers considerable insight.

Marx (1977) portrays work organization in class-structured societies as responding to two contradictory imperatives: technical efficiency and class exploitation. The conventional reading presents Marx as arguing that, under capitalist conditions, exploitation displaces efficiency as the key factor that structures organizations. In this reading, bureaucracy in capitalist firms is fundamentally a weapon of exploitation. Gordon (1976) proposes a more sophisticated variant of this conventional reading, one inspired by a linear programming metaphor: he interprets Marx as asserting that capitalist firms maximize technical efficiency under the constraint that exploitation be maintained. In neither of these variants does the conventional reading see any real contradiction between these imperatives; instead, one subsumes the other.

In both variants, the conventional reading gives pride of place to Marx's analysis of the essentially conflictual nature of the capitalist employment relation and highlights this conflictuality's ramifications for the structure and functioning of organizations. The essential organizational variable in this reading is *work intensity*: employers want to increase it, and workers want to reduce it. In this reading, Marxist organization theory joins other conflict-oriented natural-system theories in opposing both rational-system views and consensus-oriented natural-system views of organizations: Marxists, like other conflict theorists, interpret bureaucracy as a social structure of domination whose key function is control and "power over" (e.g., Benson 1977, Braverman 1974, Burawoy 1979, Clawson 1980, Clegg and Dunkerley 1980, Goldman and Van Houten 1977).

This conventional reading of Marx interprets any concern by workers for productivity or any positive appreciations by workers of workplace bureaucracy as the result of "false consciousness"—as evidence that sometimes

workers are duped into internalizing their own exploitation (e.g., Jermier 1985). In Burawoy's (1979) influential account, workers are drawn into playing shop-floor games that, unbeknownst to them, both obscure and secure the capitalist structure of exploitation.

This interpretation, however, seems forced: it does not do justice to the workers' voices quoted above. A priori, it decrees deluded any positive assessment of bureaucracy by workers. I offer an alternative reading of Marx that better honors both sides of workers' ambivalence. This reading sees both these productive and exploitative imperatives at work simultaneously, in a dialectical relation of "real contradiction." Where a *logical* contradiction is a logical incompatibility among propositions in our minds, a *real* contradiction is a contradiction in the real, observer-independent world. It is a relation where the two poles simultaneously presuppose and oppose each other (Bottomore 1991, pp. 93–94; Ollman 2003).³ The conventional reading interprets Marx as arguing that the most fundamental of the real contradictions shaping society is the contradiction between the interests of the basic classes and the resulting class conflict. The alternative reading focuses on Marx's argument that the form and direction of class conflict are themselves shaped by an even more fundamental, structural contradiction between what Marx calls the "forces" and "relations" of production (for a widely acclaimed restatement, see Cohen 1978; Engels 1978b).⁴ The conflict reading and the structural reading overlap in some ways but differ radically in others.⁵ As I will explain in the following sections, the structural reading leads to a view of the capitalist firm as paradoxical in that management must simultaneously coercively control employees and collaboratively cooperate with them.

In contrast to the conflict reading of Marx, the structural reading acknowledges that workers have an interest in production, and many of them feel that way, even in capitalist firms, as expressed by the first of the two NUMMI workers quoted in the introduction. Indeed, many workers "love the work, hate the job" (Kusnet 2008) (see also the discussion by Bélanger and Thuderoz 2010). This seems to be a rather basic anthropological fact about people at work: they may not want to work at the intensity their supervisors demand, but most people want to feel their day has been somehow productive.

The structural reading thus suggests an interpretation that seems to capture better the ambivalence toward bureaucracy voiced by employees, namely, *employees can embrace bureaucracy insofar as they see it serving as a means of productive efficiency (i.e., as an element of the forces of production), they will oppose it insofar as it appears as a means of exploitation (i.e., as an element of the relations of production), and because in capitalist firms bureaucracy typically plays both roles at once, employees will typically be ambivalent toward it even when the enabling function is salient to them.*

Tongue in cheek, Adler (2007) calls this kind of structural interpretation "paleo-Marxism" to highlight its kinship with a reading of Marx that was much more common a century ago. In the intervening period, this reading was criticized by neo-Marxists and non-Marxists alike for being corrupted by technological determinism. Like some other social and organizational theories, conflict Marxism refuses to accord technology or, more broadly, the forces of production, any consequential causal role in social phenomena, or historical trends. Goldman and van Houten (1977, p. 110, italics in original) are illustrative: in their reading of Marx, "new forces of production (technology for example) are developed to strengthen *existing* social relations of production"—no hint here that new forces of production might present a threat to the persistence of those relations of production (see also Burawoy 1979, p. 220, Note 3). Recognizing the huge impact of bureaucracy on work and work organization, this reading folds bureaucracy entirely into the relations of production. Burawoy (1979, p. 120) illustrates this in his treatment of the bureaucratic structure of firms as an "internal state" devoted entirely to "obscuring and securing surplus value through the organization, displacement, and repression of struggles"—no hint here that bureaucracy might be directed simultaneously at productive and exploitative goals, that it might create simultaneously "power over" and "power to." Because of its exclusive focus on class conflict, the conventional reading of Marx has blocked the development of a more compelling account of bureaucracy.

Because the structural reading of Marx's theory of history and capitalist society is relatively new to most readers, the next section recapitulates the account offered by Adler (2007, 2009). The subsequent sections then build on this foundation to draw out this theory's implications for our understanding of bureaucracy and its ambivalence.

3. Marxist Foundations

In Marx's theory, the key to understanding work organizations lies in the contradictions embedded in the structure of the broader society within which they are embedded, rather than in human psychology or in the nature of dyadic exchange. In the structural Marxist account, social structure has three layers: first, an infrastructure of "forces of production" composed of society's accumulated technological know-how embodied in the material means of production (tools and materials) and in workers' capabilities; second, an economic structure of "relations of production" that establishes control and de facto property rights over these forces; and third, a "superstructure" of culture, politics, and law. Causality in the overall historical process flows both upward and downward across these layers, but Marx argues for a materialist view in which, over larger aggregates and longer periods, causality flows primarily upward.⁶

This schema has a feature that is particularly interesting in the context of the bureaucracy puzzle: bureaucracy appears in it on all three levels. Bureaucracy is first an element of the forces of production: it figures here as a set of organizing techniques that can help coordinate interdependent activities. Second, it is an element of the relations of production: it figures here as a means of exploitation. And third, it is a superstructural element: a set of values and symbolically legitimated ideas. Thanks to DiMaggio and Powell (1983) and related work in neoinstitutional sociology, we have a rich characterization of bureaucracy at the superstructural level. However, neoinstitutionalism does not give us a theoretical foundation for understanding bureaucracy's ambivalence for employees in the organizational core. For this we need to focus on the first two levels—forces and relations of production.

Before we can develop this theory of bureaucracy, however, we need to explain some of the more general features of Marxist theory as they appear in this structural reading.

3.1. The Capitalist Production Process

On Marx's (1977, p. 163) account, the *relations of production* characteristic of capitalist societies derive from the nature of the commodity. The commodity is something produced for sale and as such has two contradictory aspects: its use-value (its usefulness to the purchaser) and its exchange-value (its power for the seller to command a determinate amount of money or goods in exchange). (Endnote 3 discusses the real contradiction between these two aspects of the commodity.)

As a system of commodity production, capitalist relations of production have two main features. First, ownership of productive resources is dispersed among firms, which confront each other in market competition as commodity users and commodity producers. Second, alongside those who enjoy ownership of the means of production is a class of nonowners who, lacking access to means of production or consumption, must sell their capacity to work ("labor power") for a wage, as if this capacity were a commodity on the labor market.⁷ These two features of the capitalist relations of production come together in the profit imperative—more specifically, in what Marx (1977, Chapter 7) calls the *valorization process*, where the value of the capital invested in the firm is constantly expanded by extracting more "surplus value." Surplus value is simply the value yield by the labor workers perform over and above that necessary to cover their wages; it can be increased by extending or intensifying the working day (which Marx 1977 calls the "absolute" form of surplus value) and by increasing the productivity of a given expenditure of labor (the "relative" form of surplus value). Marx calls this extraction of surplus-labor "exploitation" not because it deprives the individual worker for the full fruits of her labor—Marx

understands that productive investment requires the generation of a surplus—but because workers collectively have control over neither the generation nor utilization of this surplus.

The capitalist *production process* embodies a contradiction that reflects the two aspects of the commodity form. On the one hand, the production process is a *labor process* in which use-values in the form of work skills and effort, tools, and materials are combined to create new use-values. On the other hand, and simultaneously, it is the aforementioned *valorization process* in which these use-values appear in the form of exchange-values—monetary wages, inventory costs, and capital investment—that are combined to create money profit (see Bottomore 1991, pp. 267–270; Marx 1977, Appendix; Thompson 1989). Marx (1977, p. 450) summarizes the real contradiction between the labor process and the valorization process thus:

If capitalist direction [of work] is thus twofold in content, owing to the twofold nature of the process of production which has to be directed—on the one hand a social labor process for the creation of a product, and on the other hand capital's process of valorization—in form it is purely despotic.

The more conventional conflict reading of Marx interprets this passage to mean that the technical imperatives of the "social labor process" are subsumed or displaced by the despotic imperatives of valorization.⁸ In contrast, the structural reading recalls that in Marx's discourse, *form* can contradict *content*, and in this case, the real content of the production process (embodying its own contradiction) is negated and obscured by the despotic form in which it appears.⁹

The content of the production process is a real contradiction in which the two poles both presuppose and oppose each other. On the one hand, valorization pressures drive capitalists to upgrade the technical and collaborative capacity of the labor process. On the other hand, these same pressures simultaneously drive capitalists to intensify their exploitation of employees. The former effect proceeds through a mechanism Marx calls the "socialization" of production; the latter effect "fetters" that socialization process. The following paragraphs discuss first the socialization aspect and then the fettering aspect of this contradiction.

3.2. The Socialization of Production

This part of Marx's theory is historical and dialectical. Socialization is a historical process that unfolds on a secular time scale; it is not something easily detected in the shorter time frame of decades let alone years. The dialectical structure of the theory is visible in his account of the successive stages of this historical process. Specifically, the emergence of capitalist relations of production presupposed a certain level of development of the forces

of production. Once in place, these relations unleashed market competition, and the resulting valorization pressure greatly accelerated the further development of the productive forces via capital accumulation and innovation. Eventually, Marx predicts, the maintenance of the prevailing relations will come into contradiction with technological progress—fettering rather than encouraging the development of the productive forces—and pressures will therefore mount for the creation of a new social structure, one that is better able to support further progress of society’s productivity (the succinct, classic statement can be found in the Preface of Marx 1970).

Marx pinpoints the key mechanism driving this acceleration of technological change under capitalism in what he calls the “socialization” of production. Marx’s concept of socialization was unusually expansive. In more recent Marxist writings, as in political science more generally, socialization usually refers to the transfer of ownership from the private to the public sphere, and in psychology, socialization is commonly construed as the process whereby people new to a culture internalize its knowledge, norms, and values. Marx’s discussion of socialization (e.g., Marx 1973, p. 705; 1977, p. 1024) suggests that public ownership and psychological internalization are both forms of a more general phenomenon: for Marx, 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. The socialization of production consists of the shift from reliance on forms of knowledge that are tacit and locally generated and disseminated to forms that are explicit, codified, and globally generated and disseminated. Craft and traditional forms of know-how are progressively replaced by science and engineering, and as a result of the public goods aspects of these latter, relatively codified forms of knowledge (their nonexcludability and nonrivalrous use), new production techniques advance and diffuse far more rapidly.

Marx’s theory of socialization embraces the transformation of both the “objective” components of the forces of production (nonhuman means of production) and its “subjective” components (human capabilities). This integrative breadth makes Marx’s theory a unique resource for understanding the ambivalence of bureaucracy. However, this theory has rarely been used in recent decades.¹⁰ As a result, if we want to use it in studying bureaucracy, we need to recover it through a rereading of the original works (as summarized in the following paragraphs) and then extend it to these new, organizational domains (presented in the subsequent sections).

3.3. Objective Socialization

Valorization pressures stimulate socialization of the objective elements of the forces of production (i.e., the means of production) at both a global and an enterprise level. At the global level, firms’ pursuit of profit

leads to the emergence of increasingly differentiated, specialized branches of activity that are conjoined in an increasingly interdependent global economy (Engels 1978b, van der Pijl 1998). This represents socialization insofar as any specific producer gains access to an ever-wider set of increasingly specialized suppliers of materials, equipment, technologies, and techniques. However, this is socialization in an only indirect form, as that access is mediated by market exchange.

At the enterprise level, valorization stimulates socialization in a more direct form—as consciously managed, rather than market-mediated, interdependence (Marx 1977, p. 1024; Engels 1978b, p. 702). Under the profit imperative, successful firms expand in scale and complexity, developing extensive task and role differentiation. Engels (1978b, p. 702) characterizes it in these terms:

Before capitalist production i.e., in the Middle Ages... the instruments of labor—land, agricultural implements, the workshop, the tool—were the instruments of labor of single individuals, adapted for the use of one worker... [The bourgeoisie transformed these productive forces] from means of production of the individual into *social* means of production, workable only by a collectivity of men. The spinning-wheel, the hand-loom, the blacksmith’s hammer were replaced by the spinning-machine, the power-loom, the steam-hammer; the individual workshop, by the factory, implying the cooperation of hundreds and thousands of workmen. In like manner, production itself changed from a series of individual into a series of social acts.

As a result, the effective subject of production is no longer the individual worker but the “collective worker” (Gramsci 1971, p. 201; Marx 1977, pp. 464, 468–469, 483, 544, 644, 945). The collective worker is the entire community of more or less specialized workers, as well as technical and managerial staff, cooperating to produce use-values. Firms develop a panoply of management techniques to orchestrate this cooperation (see Marx 1977, Chapter 13). Objective socialization is also evidenced in the firm’s conscious application of science and technology developed outside the firm: the collective worker is mobilized in systematic process and product innovation efforts that leverage this public, socialized knowledge (Marx 1977, pp. 616–617). The emergence of rationally grounded organizing principles such as bureaucracy is part of the objective socialization process, representing progress toward more productive, more direct planning and management of cooperation in large-scale, interdependent operations.

3.4. Subjective Socialization

On Marx’s account, the socialization of the objective (i.e., technological, nonhuman) elements of the forces of production is intimately tied to the socialization of the subjective elements (i.e., workers’ capacities). As the

objective structure of production is socialized, employees' identities evolve—they are socialized differently as their work experiences lead them to internalize new values and ideas. The objective socialization of the forces of production pulls employees out of what Marx called “rural idiocy” (Marx and Engels 1959, p. 11) and “craft idiocy” (Marx 1955). Marx's use of the term idiocy derives from the Greek *idiotes*, denoting an asocial individual isolated from the polis (Draper 1978, p. 344ff). The objective socialization process draws workers out of such local isolation: they become interconnected indirectly via market ties as their exchange activity shifts from the purely local to the integrated global economy, and they become interconnected directly as their production activity shifts from small-scale farming and handicraft to large-scale facilities in industrialized farming, manufacturing, and services. The *idiotes* is thereby transformed into a directly “social individual” (Gould 1978; Marx 1973, pp. 704–706)—an individual whose socialized nature is not only an abstract theoretical fact but is also experienced subjectively in higher education levels, in greater access to and mastery of society's accumulated know-how, in greater breadth of social ties, and in participation in the practical activity of a collective worker. I will argue below that this shift pulls employees away from dependent or independent self-construals toward more interdependent ones (adapting the distinction developed by Markus and Kitayama 1991). The interdependent self-construals in turn predispose employees to finding in bureaucracy a useful tool for coordinating their cooperative activity.

3.5. Socialization of Relations of Production

The two previous paragraphs describe how valorization pressures stimulate socialization of the objective and subjective forces of production. This in turn stimulates steps—albeit timid and constrained by the overall dominance of society by the commodity form and by the capitalist class—toward the socialization of capitalist relations of production. According to Marx, this socialization takes two main forms. First, to reprise the political science meaning of socialization, the state takes over a growing mass of “general-interest” tasks—tasks in which the market tends to fail—such as the funding of general-purpose research and development (R&D), education, infrastructure, unemployment, and health insurance for employees. These steps toward socialization represent the “creeping socialism” that Hayek (1956) denounces. At their most fundamental, these steps reflect the advancing socialization of the forces of production, because their widespread appeal is due to their productivity benefits; this development, however, is mediated by class struggle: the proximate cause of the emergence of these new roles of the state is often massive popular pressure and class struggle.

Second, we also see signs of socialization within the business sector itself, as growing areas of the economy find themselves under increasingly planful, conscious control rather than coordinated only by the blind, *ex post* mechanism of the competitive market. Specifically, ownership shifts from the individual to the corporate form, corporate ownership is progressively centralized in the hands of fewer capitalists, and these corporations begin to coordinate, sometimes illicitly in cartels, sometimes legally under regulated conditions, and increasingly often in alliances, supply chain partnerships, and industry-wide standard-setting associations. In these ways, capitalist relations of production are partially socialized—even if the ultimate criterion directing firms' decisions is still profits rather than social utility. This tendency to socialization in the relations of production also extends to vertical and horizontal relations within the firm (see the discussion below). These steps toward socialization in the business sector also reflect, at their most fundamental, the advancing socialization of the forces of production, because their profitability is in considerable measure a function of their superior productivity.

These tendencies toward socialization of the relations of production, driven by the advancing forces of production, coexist with equally deep-seated countertendencies that flow from the persistence of the basic matrix of capitalist relations of production. The international competition and periodic crises that are characteristic of the latter can reverse either of the tendencies (and indeed, they have done so in recent decades in several regions of the world). Although the cumulative advance of the forces of production prevails over these countertendencies in the long run (i.e., the secular time frame), the persistence of the basic matrix of capitalist relations can act as a powerful fetter on this progressive evolution.

3.6. Fettering

In their real contradiction with socialization, valorization pressures do not only stimulate socialization but also simultaneously fetter it by blocking and distorting it. Instead of a broadening association of producers progressively mastering their collective future, socialization appears—at least at first—in the form of intensified coercion by quasi-natural laws of the market over firms and intensified control by corporate bureaucracies over employees within firms. Efforts to strengthen and broaden the collective worker within and between firms are stimulated by valorization pressures, but these same valorization pressures often force firms to break their social contract with employees and to break their cooperation with partner firms. Valorization pressures steer much technology development into profitable but socially wasteful ends and away from unprofitable but critical social needs. Capitalist relations of production mean that ideas in the form of science and technology are appropriated as private intellectual property,

when they would be more effectively generated and disseminated under collective, collegial control. The profit imperative in a market economy engenders economic cycles and financial instability, and these destroy resources and disrupt innovation and economic progress. Under valorization pressure, the firm ignores as far as it can the social and environmental impact of its operations, and the resulting negative externalities destroy productive resources.¹¹

4. Bureaucracy as Part of the Relations of Production

This and the following sections extend these ideas about the real contradiction between forces and relations of production to bureaucracy in the individual firm, with the aim of explaining the origins of bureaucracy's ambivalence. Any reading of Marx, conflict or structural, brings to the fore bureaucracy's role as part of the capitalist relations of production, as a means of exploitation. The four key dimensions of bureaucratic structuring—formalization and standardization, hierarchy of authority, specialization, and staff/line relations—all contribute to this function and effect. In this critique, Marxism parallels the various “conflict” variants of natural-system theories. “Open-systems” contingency theorists may not share the psychological concerns of these natural-system theorists, but they express a similar skepticism of bureaucracy when it is deployed in non-routine activities. From a Marxist point of view, these critiques of bureaucracy are underspecified because they are based entirely on a generic, transhistorical understanding of organizations: Marxists argue that our analysis needs to be more sensitive to the qualitatively distinct form of organization associated with capitalist exploitation. From this vantage point, the effects of bureaucracy that mainstream theories criticize as *dysfunctions* appear instead as reflections of bureaucracy's basic exploitative *function*. The arguments are well known, so my review can be rapid.

As part of the antagonistic capitalist relations of production, formalization and standardization are means by which management ensures control over recalcitrant and unreliable labor. These features of bureaucracy replace reliance on the worker's tacit knowledge and goodwill, and in doing so they undermine both (Clawson 1980). The resulting impediments to flexibility and innovation are also lamented by many non-Marxist theorists (Benner and Tushman 2003, Mintzberg 1979).

Similarly, the hierarchy of authority characteristic of bureaucracy is a transmission belt for command and control from above (Edwards 1979). Marxists share the concerns of many other theorists that such an authority hierarchy will disempower employees and overwhelm higher levels of management with decision tasks they are ill-equipped to handle (e.g., Kanter 1983).

As part of the capitalist relations of production, specialization is a way of narrowing the range of knowledge that is required of any one employee and thereby reducing labor costs as well as fragmenting the workforce and better controlling employees (Braverman 1974). Here too, Marxists express widely shared concerns that the result is an alienating mutilation of the employee's multifaceted potential (Nord 1974) as well as a proliferation of coordination challenges that become enormously difficult and expensive to resolve (Blau and Meyer 1987, Dougherty 1992).

And finally, under capitalist relations of production, staff functions appropriate working knowledge and put it at the service of valorization by ensuring better control over employees (Braverman 1974). Marxists share with other theorists the concern that staff functions in bureaucracies are too remote from the frontline tasks and that their control therefore stifles the creative efforts of the line organization (Mintzberg 1979).

5. Bureaucracy as Part of the Forces of Production

The distinctive contribution of the structural reading of Marx relative to the more conventional conflict reading is to argue that bureaucracy's coercive function coexists with an enabling function: bureaucracy is simultaneously a means of exploitation *and* a powerful technique for coordinating the cooperative activity of the collective worker. As part of the forces of production, bureaucracy can facilitate productive cooperation, and to the extent it functions in this way, it can be embraced by employees themselves.

This part of the Marxist account anticipates some of the themes prominent in rational-system theories, especially as it has been used in a contingency-theoretic form to understand the organization of relatively routine tasks. From the Marxist point of view, these rational-system accounts of bureaucracy's efficiency need to be deepened because they are often written from the standpoint of bureaucracy's “masters” and executives, and they do not explain why employees themselves would embrace the discipline of bureaucracy. This section discusses the structural features of enabling bureaucracy that might prompt employees' positive response; the following section addresses more specifically the psychological mechanisms involved. I then discuss how the contradictory nature of bureaucracy contributes to ambivalence among employees.

5.1. Formalization and Standardization: Sharing Knowledge

As part of the socializing forces of production, formalization and standardization are means of sharing knowledge and collective learning. Marx (1977, pp. 616–617) writes,

Right down to the eighteenth century, the different trades were called “mysteries” (mystères), into whose secrets none but those initiated into their profession and their practical experience could penetrate. Large-scale industry tore aside the veil that concealed from men their own social process of production. . . . The varied, apparently unconnected and petrified forms of the social production process were now dissolved into conscious and planned applications of natural science.

As organization structure becomes more socialized, work practices are no longer naturally emergent phenomena grounded only in local experience and mysterious to outsiders. Through formalization and standardization, working knowledge becomes social instead of private; craft secrets are replaced by codified and public engineering and science (see also Håkanson 2007). Marx’s argument suggests that bureaucratic formalization and standardization facilitate performance by codifying and theorizing best practices—socializing local knowledge to make it more widely accessible and more likely to grow more rapidly—and thereby supporting employees in their production activity (Nonaka and Takeuchi 1995). (Bureaucracy in its standard form is, of course, not the only possible mechanism for this: professionalism is an important variant. Note, however, that professionalism too represents an advance in socialization relative to craft because of its reliance on more formalized and standardized public and scientific knowledge.)

Formalization and standardization support socialization via several mechanisms. First, they create a common vocabulary and thus facilitate communication among employees who may not know each other personally. Second, they make more explicit the collective nature of the labor process by making visible the organizational architecture of that process. Third, they objectify collective memory in shared templates for action, facilitating the diffusion of these templates and thereby facilitating coordinated activity. Fourth, they specify procedures for conflict resolution via bureaucratic escalation, which makes conflict more public and less personal: formalized processes mean that the parochial concerns of subgroups and individuals and the resulting conflicts are drawn into the open, which mean in turn that these concerns become the objects of collective scrutiny and thus less covert. It is not difficult to see why employees might embrace these effects.

The structural Marxist understanding of this dimension of bureaucracy overlaps with the rational-system ideas developed by Nelson and Winter (1982) on the various functions of routines. However, these rational-system theories have not explained how bureaucratic formalization and standardization of routines can avoid becoming weapons of coercion. As Coriat (2000) argues, Nelson and Winter’s (1982) conception of routines underplays the conflictuality of the employment relation and therefore understates the resulting precariousness of routines’

“truce” function (see also Coriat and Dosi 1998). Without employees’ tacit knowledge and goodwill, the implementation of these routines will be brittle—as feared by natural-system theorists. The structural Marxist reading suggests that firms attempt to resolve this tension by progressively socializing the relations of production within the organization—even if valorization pressures constantly fetter those efforts. If and insofar as employees have the power to influence formalization and standardization, if they can participate in defining and refining these procedures and in governing how they are used, then these features of bureaucratic structuring are more likely to serve social, productive ends of use-value creation rather than the private, exploitative ends of their employers who might and often do sacrifice use-value in the drive for exchange-value and profit.

5.2. The Authority Hierarchy: Orchestrating Knowledge

As a component of the forces of production, the hierarchy of authority is a means of collective control for orchestrating large-scale cooperation. Marx (1977, p. 448) writes,

All directly social or communal labor on a large scale requires, to a greater or lesser degree, a directing authority, in order to secure the harmonious co-operation of the activities of individuals, and to perform the general functions that have their origin in the motion of the total productive organism, as distinct from the motion of its separate organs. A single violin player is his own conductor: an orchestra requires a separate one.

On the structural Marxist account, the progressive socialization of this dimension of organization structure does not consist of flattening the hierarchy in the romantic-reactionary pursuit of a primordial, undifferentiated unity, but consists instead of ensuring that the authority is endorsed from below rather than imposed unilaterally from above (using the distinction developed by Dornbusch and Scott 1975).

Even with endorsement from below, many natural-system theorists are skeptical that bureaucracy can avoid alienation. The key concern here is that Weber’s ideal type posits a monocratic structure, which does not allow decentralized decision making or individual initiative. Two considerations respond to this concern, and each can be seen as a step toward the socialization of relations of production within the firm.

First, a monocratic structure does not imply that all decisions are made centrally. As Simon (1976) argues, bureaucracies can decentralize operational decision making while maintaining monocratic control so long as the higher levels define the premises for the decisions made by the lower-level participants. A considerable body of empirical research confirms that bureaucratic organizations do indeed typically decentralize much operational decision making even though ultimate control remains centralized in the higher levels (e.g., Prechel 1994).

Conflict Marxism and natural-system theories are not impressed by this kind of decentralization because it reserves important decisions for the top and allows the rank and file only minor, operational decision making. To this, structural Marxists reply that centralized control too can be experienced as enabling if higher-level policy setting is seen by participants as guided by the collectivity's common, productive purpose rather than by the bosses' private, exploitative purposes and if the rank and file are afforded real opportunities to participate in this centralized policy setting either directly or via representatives.

This structural Marxist argument runs counter to a considerable body of organizational sociology that assumes that centralization and participation are polar opposites (e.g., McCaffrey et al. 1995); however, as these constructs have been operationalized in more sophisticated organizational research, they are not in fact opposites. Centralization is assessed by ascertaining the lowest hierarchical level at which a decision can be made without prior consultation with a superior (Pugh and Hickson 1976). Participation is assessed by ascertaining the lowest hierarchical level at which real influence on the decision is exerted (Hage and Aiken 1970). Thus, centralization is not antithetical to participation: centralization is, rather, the antithesis of local autonomy.¹² This is precisely the argument in Engels's (1978a) discussion of authority and in Lenin's concept of democratic centralism: "democracy in discussion, unity in action" (for a background and bibliography on Lenin's maligned and abused concept, see the *Encyclopedia of Marxism* entry "Democratic Centralism" at <http://www.marxists.org/glossary/frame.htm>).

5.3. Specialization: Deepening Knowledge

As a mechanism of socialization, specialization is a means of increasing the collective worker's aggregate expertise. Marx (1977, p. 486) writes,

By dissection of handicraft activity into its separate components, by specialization of the instruments of labour, by the formation of specialized workers and by grouping and combining the latter into a single mechanism, the division of labour in manufacture provides the social process of production with a qualitative articulation and a quantitative proportionality. It thereby creates a definite organization of social labour and at the same time develops new, and social, productive powers of labour.

In Marx's argument, specialization can serve as a vector of socialization by allowing the organization to deepen and broaden its expertise base. The specialization of individual employees can have deeply alienating effects (famously denounced by Smith 2003, Book V, as well as by Marx 1977, Chapter 14), but in the socialization process, these effects are reversed—not by a romantic-reactionary return to craft task identity, but by progressive increases in the depth of skills and in the participation of workers in the cooperative management of task interdependencies.

Classical organization theory identifies three general types of lateral coordination mechanisms: standards, plans and schedules, and mutual adjustment (Thompson 1967). (To these, Van de Ven and Delbecq 1974 add teamwork, as a higher form of mutual adjustment.) All of these mechanisms—including mutual adjustment and teamwork—can benefit from enabling forms of standardization, formalization, and authority hierarchy: Adler and Heckscher (2006) call such coordination "interdependent process management." The "standardized work" process at NUMMI described in the introduction provides an illustration.

5.4. Staff: Distilling and Infusing Knowledge

With the growing scale and complexity of the enterprise, specialization progresses from the shop floor into management functions. New staff groups appear—engineers, accountants, etc. As part of the forces of production, these staff functions are part of the collective worker: they provide specialized expertise to management and ensure collective learning by synthesizing internal and external information on best practices and by infusing these practices across the organization (see, e.g., Engels 1870 for the important contributions of staff functions to the effectiveness of the Prussian military; Marx 1972, p. 179).

The structural Marxist perspective suggests that staff functions can play an important role in the socialization of organization structure by distilling and infusing knowledge. Employees might embrace this division of labor so long as staff/line relations are themselves collaborative. Relations of production must be socialized so that these staffs function in the service of the broader collectivity rather than as mechanisms of class exploitation. There is an extensive practitioner-oriented literature on how this can be ensured; see, for example, Lawler and Boudreau (2009) on the human resources function and Butler et al. (2001) on the configuration management function.

6. Subjective Socialization

As I noted above, some of the previous section's discussion of the objective socialization of organization structures reformulates ideas that have already been articulated by rational-system theorists, but these theorists have been largely silent on bureaucracy's ambivalence. Stepping into this breach, natural-system theorists have maintained that bureaucracy of any kind—whether enabling or coercive—is characterized by prescribed procedures and management controls that reduce autonomy, and by a fine-grained vertical and horizontal division of labor that reduces task variety and task integrity. Even an ostensibly enabling form of bureaucracy, natural-system theorists argue, surely undermines employees' intrinsic motivation. As I noted earlier, this skepticism is often

based on theories that postulate a universal need for individual self-determination and autonomy (e.g., Deci 1975, Hackman 1980).

Reading Marx in the structural manner brings to the fore an alternative understanding of motivation, and this in turn offers us an alternative understanding of how workers come to embrace bureaucracy's enabling features. The "great civilizing influence" of capitalism (Marx 1973, p. 409) is not only to stimulate enormously the development of the objective components of the forces of production but also to socialize the subjective components—enabling a giant step away from the *idiotes* and toward the realization of humankind's fundamentally social nature:

When the worker cooperates in a planned way with others, he strips off the fetters of his individuality, and develops the capabilities of his species. (Marx 1977, p. 447)

It is easy to see how such socialized individuals could embrace bureaucracy as a technology for coordinating the efforts of the collective workers of which they are a part.

The conflict reading of Marx has encouraged us to think that Marx imagined that this subjective socialization could only materialize after capitalism's replacement by a superior form of society (a view implicit in, e.g., Cohen 1988b). But the structural version of Marx is more dialectical: here, socialization begins to emerge within advanced capitalism, paving the way for that superior form.

[L]arge-scale industry... makes the recognition of variation of labour and hence fitness of the worker for the maximum number of different kinds of labour into a question of life and death... [T]he partially developed individual, who is merely the bearer of one specialized social function, must be replaced by the totally developed individual, for whom the different social functions are different modes of activity he takes up in turn. One aspect of this process of transformation, which has developed spontaneously from the foundation provided by large-scale industry, is the establishment of technical and agricultural school. Another is the foundation of "écoles d'enseignement professionnel [vocational schools]."

(Marx 1977, pp. 618–619)

Adler's interviews at NUMMI provide some examples of the subjective socialization of workers' self-understanding:

I wish you could talk to the guys' wives about the changes they've seen. I was a typical macho horse's ass when I worked at Fremont. When I got home, I'd get a beer, put my feet up and wait for dinner to be served. I'd figure, "I've done my eight, so just leave me alone." Now, I'm part of a team at work, and I take that attitude home with me, rather than dump my work frustrations all over my family. I'm much more of a partner around the house. I help wash the dishes and do the shopping and stuff. My job here is to care, and I spend eight hours a day doing that job, so it's kind of natural that I take it home with me. (Adler 1993, pp. 148–149)

6.1. The Social Self

The structural Marxist approach in psychology is echoed in the critique of much non-Marxist social psychology advanced by Fiske et al. (1998, p. 919):

Most contemporary social psychological theorizing begins with an autonomous individual whose relationships are a means to certain asocial ends... Consequently, social psychological theorizing often reflects a Western concern that the social group will somehow overwhelm or disempower the autonomous, agentic self.

Cultural psychologists have found that in some other (macro) cultures, notably some Asian ones, people's "self-construals" often value interdependence over independence (see Markus and Kitayama 1991; see also Triandis 1995 on allocentric versus idiocentric orientations). Moreover, consistent with Marx's analysis, this research also shows that workplace experience can affect self-construals (Fiske et al. 1998, Triandis and Suh 2002).

The literature on the "social self" has explored variation in self-construals and the process by which this variation is affected by both the broader culture and work experience (Bakhurst and Sypnowich 1995, Burkitt 1991, Taylor 1989, Wertsch et al. 1993). Weaker forms of the social-self thesis have been visible in management research in social identity theory (Tajfel and Turner 1986) and in social information processing theory (Salancik and Pfeffer 1978): here, individuals' psychological machinery is at any given point in time already in place, but their perceptions and therefore behavior are modified by social pressures. The stronger form of the social-self thesis has been less visible but is arguably even more compelling: it proposes that "our very capacities to think and act are themselves socially constituted" (Bakhurst and Sypnowich 1995, p. 5). Vygotsky (1962, 1978), Dewey (1930, 1939), and Elias (2000) all articulate versions of the strong form. In Marx, we find it in the assertion that human nature is nothing but "the ensemble of the social relations" (Marx 2002).

Objectively viewed, the self is always social, always the result of a (ongoing, not only childhood) socialization process. It is just as much the result of socialization when it results in the dependent self-construals common in precapitalist society or in the independent self-construals presupposed in individualistic psychological theories. Historically, the prevalence of individualism reflects (a) capitalism's destruction of precapitalist bonds of collectivistic *gemeinschaft* community, and (b) a level of technology where each person works relatively independently of others. With further socialization of the forces of production, the scale, complexity, and interdependence of production increase, and as a result, self-construals mutate and tend toward an interdependent form too. The social character of the self becomes more

salient: the social self is no longer merely an abstract, theoretical proposition but becomes concrete in the form of the collective worker and in internalized interdependent self-construals. What matters to employees' self-esteem and identity is now not so much their individual efficacy as their collective efficacy (Bandura 1997, Gibson 1999). The self is socialized—as it always had been—but now this socialization is not merely a remote antecedent but becomes a lived reality.

As suggested by the paragraph above, a Marxist analysis points to the need to go beyond the common contrast of individualism and collectivism. The objective socialization of capitalist industry drives a new subjective socialization, engendering values and self-construals that tend dialectically, over the longer time frame, to transcend the individualism/collectivism opposition. As a result, individualism and collectivism become orthogonal rather than polar constructs, and new, more directly socialized subjects score high on both. Empirical research finds that this combination is not all that uncommon (Oyserman et al. 2002). Such a self-construal provides a less conformist form of other-directedness (Livingston 2000)—a “low-power-distance” form of collectivism (Triandis and Gelfand 1998, Triandis and Suh 2002), a form of caring rather than submission, and a self-construal that is properly interdependent rather than independent from or dependent on the collectivity.

Marx's concept of subjective socialization offers a powerful lens for understanding the psychology of the individual functioning as part of the collective worker in a bureaucratized organization structure. However, the conventional conflict reading of Marx has overlooked this aspect of Marx's argument. Instead of the emergence of the interdependent social individual, conflict Marxists see a trend toward deskilling and degradation, the destruction of traditional forms of collectivism, and a growing polarization between a small number of experts and the masses of deskilled, alienated, individualistic workers (Braverman 1974). The conventional interpretation of Marx is thus consonant with a broad range of commentators who argue that capitalist development “corrodes” character and undermines traditional solidarities (Sennett 1998), and with much natural-system theory, which celebrates individual autonomy and sees organizational controls as intrinsically alienating.

7. The Sociological Ambivalence of Bureaucracy According to Marx

The thrust of the previous sections has been to show that bureaucracy functions on both poles of the contradiction between the labor process and the valorization process, both facilitating collaboration and enforcing exploitation. Given the real contradiction embodied in

bureaucracy, the result will be that even when the enabling function of bureaucracy is salient to employees, bureaucracy will be experienced simultaneously as alienating. This is the sociological ambivalence this paper aims to explain.

To elaborate, on the one hand, valorization pressures drive a socialization of production, which draws workers into mutual interdependence, and it prompts steps toward the socialization of the relations of production within the firm. These steps are embodied in shifts from the autocratic form of authority characteristic of the capitalist employment relation toward a more democratic form. Under these new conditions, employees' self-understandings become more interdependent, and they are inclined to embrace bureaucracy as a tool for coordinating their cooperative endeavor. This socialization of the labor process encourages a deeper, more personal engagement with work and an attitude of greater professional responsibility and organizational commitment. The structural reading of Marx leads to the conclusion that the progressive socialization of the forces of production tends over time to socialize also the relations of production not only at the societal level but also within the firm, by creating forms of cooperation that prefigure a postcapitalist, socialist free association of producers. Socialism, Marx says, emerges first within capitalism: “New, higher relations of production never appear before the material conditions of their existence have matured in the womb of the old society itself” (Marx 1970, Preface); and “if we did not find concealed in society as it is the material conditions of production and the corresponding relations of exchange prerequisite for a classless society, then all attempts to explode it would be quixotic” (Marx 1973, p. 159).

On the other hand, valorization pressures simultaneously fetter the socialization trend, constantly undoing these steps toward collaboration, rendering bureaucracy's enabling function less salient and its coercive function more salient, provoking subjective alienation. Socialized organizational structures—large-scale bureaucratic organizations—are developed under management direction and are guided by profit-maximization imperatives; they therefore typically appear to workers as an alien constraint rather than as a means by which they master their collaborative efforts. Moreover, bureaucracy often serves as a weapon directed against workers, because managers use the machinery of bureaucracy to intensify exploitation and to orchestrate layoffs to maintain competitiveness, and use it to deprive employees of voice in organizational governance to allow owners to assert unilaterally their prerogatives. These are the structural conditions inherent in capitalist relations of production that lead Marx, in the excerpt quoted above, to say of the capitalist direction of work that it is “twofold in

content” but “in form it is purely despotic” (Marx 1977, p. 450), and in another passage to write,

This entire development of the productive forces of *socialized labour* (in contrast to the more or less isolated labour of individuals), and together with it the *use of science* (the *general product of social development*), in the *immediate process of production*, takes the form of the *productive power of capital*. It does not appear as the productive power of labour. . . . [T]he social character of his labour confronts the worker as something not merely alien, but hostile and antagonistic, when it appears before him objectified and personified as capital.

(Marx 1977, pp. 1024–1025, italics in original)

Society’s broader structure of capitalist relations of production ensures the reproduction of the coercive face of bureaucracy via two main, interrelated causal pathways. First, the pursuit of exchange-value and economic profit is in constant tension with the pursuit of use-value and technical performance. Although firms cannot hope to sustain profits if their products represent no use-value, valorization pressures push the firm to cut costs even when doing so jeopardizes its products’ quality and performance attributes. Bureaucratic structures are often mobilized in this use-value-destroying process. The market logic of production for profit is thus in recurrent conflict with a logic based on production for use. Employees experience such a conflict as demoralizing and alienating.

Second, the foundation of capitalist relations of production in the exploitation of labor threatens constantly to undermine the cooperation required for the effective functioning of the collective worker. The valorization imperative, embodied in the pressure of competition on labor, product, and capital market, imposes a harsh discipline on firms, forcing them to lay off employees when the firm is not expanding the value of invested capital quickly enough. Such layoffs are effected through the coercive deployment of bureaucratically centralized power, they disrupt working collaborations, and they destroy the fabric of trust between vertical layers of the collective worker.¹³

Valorization pressures, in sum, simultaneously (a) stimulate the emergence of the collective worker, drive the development of bureaucracy as a tool for coordinating this collective worker, catalyze a shift to more interdependent self-construals, and encourage workers to embrace bureaucracy; and (b) break the collective worker into antagonistic classes and categories, and encourage workers to retreat to either a more defensive and antagonistic collectivism or to an alienated individualism and to reject bureaucracy. Whence bureaucracy’s sociological ambivalence.

8. Discussion and Conclusion

My rereading of Marx has suggested a new understanding of bureaucracy’s sociological ambivalence. The following paragraphs first register some limitations of my

argument and second identify some implications and avenues for future research.

8.1. Limitations

This paper was motivated by the recurrent finding that employees feel ambivalent about bureaucracy even when the enabling function is salient. My analysis of this puzzle is limited by my focus on just one set of antecedents. First, I focus on sociological rather than psychological sources of ambivalence. Although sociological ambivalence predicts an overall average level of psychological ambivalence, I have not addressed the multiple elements of individual psychology that might account for variance around that mean. Moreover, because of individual differences (dispositional or situational), some people simply do not accommodate themselves to work in a bureaucratic organization, no matter how enabling. And second, I focus on the class dimension of this sociological ambivalence, and in doing so I leave aside numerous other situational determinants that warrant exploration: feminists have pointed to the differential significance of bureaucracy for men and women (e.g., Acker 1990), cross-cultural studies have pointed to the different meaning of bureaucracy in different cultures (e.g., Hamilton and Biggart 1988, Hofstede 1980), bureaucracies embody not only class but also status differentials, and status competition engenders its own ambivalences (e.g., Blau 1954).

This paper has restricted its focus to bureaucracy under capitalist conditions. Within this boundary, I have suggested that the pessimism concerning bureaucracy expressed by Weber and natural-system theorists is misconceived: this pessimism is based on individualistic presuppositions that value autonomy over interdependence; it assumes that interdependence must degenerate into dependence, it naturalizes exploitation, and it thus makes alienation an inevitable concomitant of any form of large-scale production. My argument does not imply, however, that a higher form of society, a postcapitalist society, would not need to contend with human problems created by bureaucratic forms of organization; my argument does imply that these problems would be posed differently and would need to be addressed in different ways. I leave that discussion for another paper.

8.2. Implications for Future Research

Notwithstanding these limitations, this structural Marxist view suggests several avenues for future research. First, the concept of socialization suggests several areas of research.

To start with the subjective aspects, the socialization thesis leads to strong predictions concerning the self-construals of employees in different kinds of work settings. So far, empirical research on self-construals has not addressed the workplace, but if indeed objective socialization drives subjective socialization, interdependent self-construals should be more common in

workplaces where enabling bureaucracy has been further developed. Second, in such settings, workers' values should more often reflect a low-power-distance form of collectivism, and if that is the case, workers should be less likely to blindly defer to management authority, whether that authority is autocratic or paternalistic in form. Third, such dispositions should have political effects beyond the workplace; empirical research on this hypothesis has barely begun (Schlozman et al. 2009, Schur 2003, Sobel 1993, Torbet 1973), but the work of Kohn et al. (1990) traces a path this research could follow.

Turning to the objective dimensions of socialization, these suggest an alternative interpretation of current mutations in the industrial structure. Many observers have expressed concern over "outsourcing," the resulting fragmentation of traditional workforce solidarities, and the possible erosion of traditional sources of corporate competitive advantage. Conflict Marxists and many other critics see outsourcing as a way for firms to cut costs by shifting responsibility for some of the focal firm's low-value-added tasks and maintaining only a high-value-added core. In contrast, the socialization hypothesis suggests that we might also see outsourcing as a process by which the social division of labor is progressively complexified and enriched. The structural Marxist hypothesis here is that these outsourced services are the germs of whole new specialized industries, which will develop their own trajectories of technical innovation rather than remaining mere appendages to their clients.

The socialization lens also puts in a different light the debate over the growth of our largest firms, such as Walmart (for example, see Fishman 2006, Lichtenstein 2006). The structural Marxist perspective highlights the considerable advance in productivity created when Walmart displaces a large number of smaller retailers, allowing it to orchestrate directly, through its internal bureaucracy, a hugely expanded collective worker and to assert more planful, IT-enabled hierarchical control over its globalized supply chain. That productivity is reflected in lower prices that benefit working people's living standards. Clearly, this bureaucracy is often experienced as coercive by employees and suppliers; but the prospects for improving the condition of these employees and supplier firms (and for improving other outcomes, such as environmental sustainability) are greater now that they are under the control of a single employer than when their control was dispersed across the thousands of small firms that Walmart displaced. On this view, if neither unions nor government regulators have yet seized effectively on these opportunities, this speaks to the current weakness of these actors, not, as many have argued, to the intrinsically socially regressive significance of Walmart's ascendancy. The policy implications of the structural Marxist view would be to socialize Walmart further—if not to nationalize it, then to force

it to better serve society's needs through regulation and union organization—not to abolish it and return to dispersed small-scale operations (see, most notably, Marx 1977, p. 635, on the progressive import of the "conversion of numerous isolated small industries into a few combined industries carried out on a large scale").

Second, going beyond the socialization concept itself, the structural Marxist account provides a promising starting point for understanding the roadblocks encountered by organizations attempting to bureaucratize effectively. On this reading of Marx's theory, we should expect that firms under valorization pressure will continually seek ways to organize the collective worker more effectively; at the same time, however, they will be continually tempted to use organization structures as a coercive weapon even though this risks undermining the collective worker's effectiveness. As a result of this constellation of contradictory forces, we should expect socialization to progress, but only in a halting and uneven manner. This seems to be consistent with the literature showing that the diffusion of many "high-performance work practices" has been remarkably limited, as has been the diffusion of other organizational forms that socialize the firm-level relations of production, and that such reforms are often undone over time, in a "two steps forward, one step back" trajectory (e.g., Osterman 2000). Adler (2003) suggests a researchable hypothesis in this spirit. Whereas several researchers have identified a pattern of alternating rhetorics of commitment and control over the past century (Abrahamson 1997, Barley and Kunda 1992, Guillén 1994), the socialization thesis suggests that there should be an underlying trend line at work here, both deepening commitment across the successive commitment phases and expanding control (first within the firm, then beyond it) across the successive control phases. Such a perspective may help reconcile the long-running divide between the enthusiasts who are ever ready to trumpet new trends in management and the skeptics (see Alvesson and Thompson 2006, Eccles et al. 1992) who argue that there is nothing much new under the sun when it comes to management.

The structural Marxist account also suggests a path for research on variations across firms in whether bureaucracy's enabling function is salient to employees. The structural Marxist account predicts that this will be more likely where bureaucracy is seen by employees as contributing more to use-value production and where employees feel they are sharing more in the fruits of this productive effort. This will be more likely in firms where employees have considerable power (unlike employees at Walmart) (Wright 2000 makes a similar argument). We should therefore expect to find employees more cognizant of bureaucracy's enabling function where employees are organized into unions; where the nature of their tasks makes employees' goodwill more

critical to business success, such as in more professionalized occupations and in professional service firms; and where government policy and supporting institutions—the prevailing “variety of capitalism” (Hall and Soskice 2001)—encourage employee and union voice. However, so long as firms are embedded in a fundamentally capitalist socioeconomic structure, these antecedent conditions and the appreciation by workers of bureaucracy’s enabling function are precarious accomplishments, likely to be at least partly obliterated with the next serious economic crisis (Ramsay 1977). In firms lacking these antecedent conditions, bureaucracy will appear in a more coercive form, and workers will not be ambivalent so much as hostile or alienated.

Finally, this structural Marxist perspective suggests some avenues for research on changes in the nature of bureaucracy over time. Organizational scholarship has treated bureaucracy as if it were a largely fixed organizational form discerned by Weber and unchanged since then. If indeed it makes sense to see bureaucracy in the way I have proposed, then it seems useful to ask how bureaucracy has participated in the ongoing socialization of production: How have the basic principles of bureaucracy advanced over time? One aspect of this question seems particularly worthy of study: the progressive adaptation of bureaucratic principles to less routine activities and to more educated workers. Indeed, as noted in the introduction, the bureaucratic form has, in recent years, been adapted to numerous professional, R&D, and interactive services—places where standard contingency theory sees little room for it. Some scholars see this as colonization by isomorphism; others see it as an expanded assertion of a capitalist control imperative that will stifle innovation. In contrast, the structural Marxist account is open to the possibility that this extension represents at the same time a productive advance in the techniques for organizing cooperation among knowledge workers. Empirical research could examine how these sectors have innovated in creating more enabling forms of formalization, standardization, hierarchical authority, specialization, and staff/line relations—forms more suited to less routine tasks (for one study in this spirit, see Adler 2006).

Conclusion

The puzzle motivating this paper is the ambivalent reaction of employees to bureaucracy even when its enabling function is salient to them. I have argued that this ambivalence can be fruitfully understood as a function of the dual role of bureaucracy in the capitalist enterprise. To summarize, as modern capitalism has evolved, traditionally independent and small-scale producers have been progressively replaced by larger-scale production—a form of production whose animating force is no longer the individual worker but what Marx called the collective worker. Bureaucracy serves two functions in relation

to this collectivity: as part of the forces of production, bureaucracy is a powerful set of organizing techniques enabling planful coordination; on the other hand, bureaucracy is simultaneously a part of the capitalist relations of production, where it functions as a means of exploitation and coercive control and, as such, threatens to stifle the collaboration needed for effective production. Examined through structural Marxist lenses, these two functions embody the coexisting poles of a real contradiction at the heart of the capitalist enterprise, and this contradiction explains bureaucracy’s ambivalence.

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Endnotes

¹We should note Gouldner’s own ambivalence, visible in the contrast between the optimism of Gouldner’s 1954 account in *Patterns of Industrial Bureaucracy* and his position in his 1955 “Metaphysical pathos and the theory of bureaucracy” article. In the latter, Gouldner’s argument is not that bureaucracy can take a more representative form but that bureaucracy as such is a “disease” (Gouldner 1955, p. 507) and that we need to combat the pessimism that abandons any hope of “mitigating” (p. 507) this disease’s negative effects, assuming that “there is no escape from bureaucracy” (p. 503).

²As Merton (1976) points out, sociological ambivalence can stem from (a) the individual’s involvement in different status sets with competing demands, (b) different roles within the same status, or (c) the internal contradictions of a single role in a single status. Weber points us to the first kind: here, employees are ambivalent because of the tensions between their roles in the family (as breadwinner) and in the workplace (as subordinate). This is the tension March and Simon (1958) highlight between the “decision to participate” and the “decision to produce.” Gouldner points us to the second kind: here, the one status (employee) creates ambivalence by virtue of the tension between different expectations between roles that are managed coercively and roles that are managed more collaboratively. Gouldner’s own gypsum mine case study contrasted coercive absenteeism rules and enabling safety rules. The cases I focus on in the present article represent ambivalence of the third kind—which is arguably the most fundamental of the three: ambivalence here emerges from the contradictions internal to a given role (producer) in a given status (employee).

³The idea that the objective world embodies contradictions is rather foreign to the Anglo-American intellectual tradition: we often assume that contradictions obtain only between logical propositions, not between real things. This was not so for Marx. To illustrate, I take an example that is foundational for Marx’s analysis: the “commodity”—using the term to refer to any product or service produced for sale rather than for direct use—embodies a *contradictory unity* of use-value and exchange-value. The two poles represent a *unity* because they *presuppose* the other: for the product to be created in the first place, the producer must believe it has exchange-value,

power for the seller to command a determinate amount of money or goods in exchange; to generate this exchange-value for the seller, the product must have use-value, usefulness to the purchaser. At the same time, the two poles are *contradictory* because they *oppose* each other: their disjointedness can put them in conflict with each other, and this happens in at least two ways. First, the producer anticipates the exchange-value of the product but does not know until she reaches the market if this hope will be realized or if, on the contrary, the use-values that were consumed in producing the commodity will be wasted: pursuit of exchange-value can lead to destruction of use-value, for example, if houses or food supplies are abandoned because they cannot be sold at a profit. Second, when production is oriented to exchange-value, there are many socially important use-values that remain unmet—for example, a sustainable environment or universal health care.

⁴Cohen's (1978) version of Marx has been criticized by, among others, Levine and Wright (1980), Elster (1985), and Cohen (1982); see Cohen (1988a) for elements of reply, and see Wright et al. (1992) for further debate. Note that Cohen's (1978) interpretation does not entail commitment to some of the more controversial elements of Marx's theory (labor theory of value, tendency of the rate of profit to fall): this interpretation is even less tied to any defense of the former socialist regimes.

⁵Marx's writings themselves are open to both conflict and structural interpretations. Adler (1990) argues that this is because these writings, even *Capital*, mixed the analysis of long-term and shorter-term trends and combined objective analysis with polemical advocacy. I call my reading "structural" but not "structuralist" because the latter label has been associated with the Althusserian school of Marxist thought, and my argument bears only a modest resemblance to theirs. My term is nevertheless somewhat awkward, because in the broader spectrum of social theories, even the conflict variant of Marxism is clearly more structural and less agency oriented than many other social theories on offer.

⁶This materialism contrasts with Weber's agnosticism on the relative importance of material and ideational factors in the overall sweep of history, and it contrasts with a range of idealist views that give culture and politics the determinant role (see Adler and Borys 1993 on materialism and idealism in organizational theory). Even many writers sympathetic to Marx have been driven away from this "base/superstructure" model by the difficulty of giving it rigorous testable form. Structural Marxists, however, see no reason to throw the baby (a broad historical generalization with considerable empirical validity and heuristic power) out with the bathwater (the dogmatism that substitutes this generalization for the concrete analysis of concrete situations). I should note too that there is room for agency here, but in the sweep of history it is delimited: "Men make their own history, but they do not make it just as they please; they do not make it under circumstances chosen by themselves, but under circumstances directly encountered, given and transmitted from the past" (Marx 1852).

⁷Note that on this definition, the United States is as capitalist today as it was in Marx's time, if not more so: although the government sector has grown, this has been considerably outweighed by the absorption of a larger mass of formerly independent agricultural producers into wage-labor status.

⁸Conflict Marxists therefore see the historical transition from the "formal subordination of labor to capital" based on absolute surplus value to "real subordination" based on relative surplus value (Marx 1977, Appendix) as a process that reshapes the labor process to the exigencies of the valorization process and progressively eliminates the basic contradiction of the production process—which they see as the conflict between classes (Thompson 1989, p. 108). The structural reading, in contrast, sees this transition as deepening, not eliminating, the more fundamental, structural contradiction.

⁹The real contradiction between form and content, appearance and essence, is a common theme in Marx's work as in Hegel's. Geras (1971) explains the pitfalls of interpreting a socially contingent form as the true substance and the converse pitfalls of seeing the form as a mere illusion.

¹⁰This gap is arguably due to the embarrassment of 20th-century Marxists in dealing with the evidence that capitalist development could continue to foster further development of the forces of production, when these Marxists wanted to assert that capitalism was already obsolete (Adler 2007). A search of the compendium of Marxist writings on the Marxists Internet Archive (<http://www.marxists.org/index.htm>) and via journal search engines reveals that when the term "socialization" appears in Marxist discourse, it has been used almost exclusively to refer to the shift in relations of production to public ownership. Very little has been written about the socialization of the forces of production (exceptions include Nelson 1990, p. 211; Mandel 1968, p. 170ff; Kenney and Florida 1993, pp. 304–305; Howard and King 2008), and virtually nothing has been written about this phenomenon at the enterprise level nor about the subjective aspects that so impressed Marx. The Italian writers in the anarchist "autonomist" tendency such as Negri (1989) have perhaps been the most active in using Marx's ideas of subjective socialization, but their appropriation of Marx is highly selective.

¹¹On Marx's theory, the balance between stimulating and fettering shifts toward the latter as capitalism matures, increasing the likelihood of fundamental change in social structure. More specifically, the direct costs and the opportunity costs of fettering increase, and with them, social strains increase too. At the same time, the continuing socialization of the forces of production includes the progressive enrichment of the cognitive and social capabilities of employees, creating over time a broader mass of people who are both increasingly offended by such costs and increasingly able to take on the leading roles in industry and society. Because of these changes in society's technological foundation and its economic structure, the potential for fundamental change—change that would propel society beyond its capitalist form—tends to increase over the longer term. Whether such potential is realized depends on changes in the political-ideological superstructure, and these latter changes are much more difficult to predict. Note that at this very fundamental level, Marx's theory is agnostic on whether such a fundamental change can happen gradually or requires a revolutionary rupture.

¹²Tannenbaum's (1961) "control graph" gives us a way of conceptualizing power structures where both lower levels (rank and file) and higher levels (top managers, leaders) exercise influence in a nonzero-sum manner (see also Henderson and Lee 1992, Sagie 1997, Tannenbaum and Kahn 1957).

¹³A reviewer posed an important question about the response of workers' cooperatives to these same pressures. Although cooperatives represent an important step in the socialization of relations of production, they only do so at the firm level (and sometimes in the alliances they form with other cooperatives, as in the Mondragon case). They may have surmounted one of the two defining dimensions of the capitalist relations of production (exploitation within firms), but they have not escaped the other dimension—competition between firms. To the extent that they must compete on product and capital markets (especially the latter), this competition drives them on pain of bankruptcy toward production for profit.

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Paul S. Adler is the Harold Quinton Chair of Business Policy at the Marshall School of Business, University of Southern California, and a visiting professor at the Manchester Business School. His research focuses on organization theory and design.