Institutions, learning and labour: state policy, management strategies and worker response

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More personally, my mother and late father have been a tremendous support. Lastly, thanks to my companion Helen for patience on a grand scale.
List of papers

Paper 1:

Paper 2:

Paper 3:

Paper 4:

Paper 5:
Abstract

The thesis considers the interplay of institutions, lifelong learning and workplace relations. Learning has become a prominent notion in contemporary considerations of the workplace, particularly in the accounts of managerialists and policy makers (Keep & Rainbird, 2000). In its articulated forms of organizational learning and lifelong learning it is seen as a means whereby production can be more dynamic and flexible, while at the same time providing fulfilling experiences of work (Senge, 1990). This thesis - and the papers in it – contends that these notions of learning merit closer critical scrutiny from which an enhanced understanding of a particular (and arguably important) dimension of contemporary workplace relations can emerge.

This thesis takes a critical position for its investigations, seeking to challenge orthodoxies constructed from the standpoint of managerialist ideology (Legge, 1995). It finds labour process theory (Thompson & McHugh, 2002) particularly useful in the manner that workplace relations are seen as antagonistic and that the politics of production are regarded as ‘contested terrain’. Managerialist techniques (such as the learning organization) – especially those with a humanistic, unitarist and emancipatory rhetoric – cannot be viewed outside of the wider political economy of the workplace and the social organization of economic activity (Granovetter, 1992). As such, much of the espoused intentions of such managerialist techniques can be viewed as questionable, doing little to reconcile asymmetrical power relations and exploitation.

The five papers published over a period of four years vary in scope and method of enquiry. However, what links them is a concern for the concepts represented in the title of this thesis: institutions, learning and labour. More specifically, the papers cover state policy on lifelong learning, the changing management of public sector organizations, social capital, the learning organization (and by implication contemporary management discourses in general) and the industrial relations of lifelong learning. In doing so, critical perspectives on workplace organization are used. Ultimately, a challenge is presented to managerialist and policy discourses of learning which are considered to be instruments of control rather than a means of emancipation for workers. The thesis concludes with the idea that the apparatus and discourses of learning and lifelong learning have been dominated by the state and capital in order to manipulate the culture of the workplace and to establish control of labour processes. As such, the imperative is for organized labour and workers to resist this hegemony and to assert their own learning frameworks.

Key words:

Learning; institutions; managerialism; labour; skills; policy
“Idque apud imperitos humanitas vocabatur, cum pars servitutis esset.”

Introduction

This claim to doctorate status is made on the basis of the author’s published work since 2000 together with this accompanying commentary. The commentary seeks to contextualise and link the catalogue of work; in doing so it is hoped that it makes a distinct contribution to the development of social scientific knowledge in the areas of the critical study of work, organization and their social and economic context. A developmental ‘journey’ is presented whereby theoretical perspectives and methodologies are explained. The milieu of the research undertaken is subjected to development and critique in a form that is intended to map a process of growth and exploration from the turn of the century to date. Ultimately, just as the thesis seeks to illuminate critical aspects of organizational and institutional processes of learning, the continual and challenging learning of the author should also be very much in evidence.

It is an expectation that a piece of work presented at this level and this context should be of substance, coherent, and should make a valid contribution to knowledge. It is also desirable that it be demonstrated that the impulse for any doctoral exploration should demonstrably emanate from an identification of a problem facing humanity and its environment and a wish to understand and go some way towards the solving of that problem. In the case of this thesis, the work featured is constituted from a body of research that is linked by common strands, themes and concerns about the social organization of economic activity and how it impacts on society. In this thesis the problem is how discourses of learning are used within the context of the system of regulated market capitalism that frames economic life (particularly employment) in its various forms in the world’s developed democracies (see Warhurst, 1997).

Learning, a fundamental human process, has become institutionalised and formalised in societies, most recognisably in the form of progressive system of education, *a sine qua non* of any functional society. However, learning is also associated with the formation of skills and appropriate conditions in the workplace for the sustaining of production. Thus, in a historical phase of the development of capitalism where skills and the capacity to develop and adapt skills to the needs of volatile production imperatives are regarded in corporate and policy rhetoric as the means of achieving ‘competitive advantage’ in a ‘global’ economy, discourses of learning play a number of important roles in the configuration of the relations of production. These roles range from how the state seeks to formulate policy on learning (e.g. lifelong learning) to both facilitate the development of appropriate skills but also to manipulate the cultural sensibilities of the labour market. Likewise employers, influenced by management thought, have discovered learning as part of a project to monopolise discourses of skill formation and thus labour processes. As this thesis seeks to demonstrate, this potentially has profound effects for experiences of employment across the economy and society. Labour, in a collective sense and as

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1 “All this in their ignorance, they called civilization, when it was but a part of their servitude”, from Tacitus, *Agricola*, Book 1
individual workers, are faced with responding to these notions of learning in order to counter exploitation, insecurity and to preserve the integrity of their experience of work.

From these issues, this thesis is faced with a number of research questions that require addressing:

1. What is the impact of developments in the political economy on state policy apparatus and institutions of learning and how do they respond to emerging discourses of skill formation?
2. How do contemporary discourses of learning feed into organizational ideas (e.g. the learning organization) and interplay with ideas in civil society?
3. What are the limitations of managerialist discourses of learning in the face of frameworks of contemporary workplace relations?
4. What is the response of labour to state and management driven discourses of learning?

These questions can in turn be developed into a set of research objectives which it is hoped are fulfilled by the papers and this supporting document (or kappa). These objectives can be expressed as follows:

1. To assess critically how state policies on learning have been shaped by changing production imperatives and how these policy articulations impact on public sector organizations involved in the delivery of learning.
2. To examine and challenge the formulation and assumptions behind ideas of how problems of cohesion in work organization and civil society are being addressed and how these two domains interplay.
3. To provide a robust critique of managerialist notions of learning in the workplace (e.g. the learning organization) in the context of critical theories of workplace organization.
4. To investigate critically the responses of organized labour and individual workers to state and managerialist discourses of learning, assessing how they can ameliorate the experiences of workers while considering the limitations of these responses.

What follows is a summary of and critical commentary on the thesis made up of the five papers. A general exposition of the broader themes and issues is followed by a more in depth account of each of the papers and their contribution. The commentary concludes with a statement of the current state and future prospects for the author’s scholarly development.

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2 The terms ‘discourse’ and ‘discourses’ are not necessarily used in this document to signify any specific scholarly form (e.g. that of Foucault denoting a set of common set of unified assumptions); rather it denotes a constituted or constructed rhetorical position or expression of ideology usually through a particular set of vocabularies.
Background: assumptions and the formation of the author’s position

The first meaningful scholarly encounter with the themes of this thesis was as an undergraduate student in Scotland in the early 1990s. The programme of study involved a mix of the social sciences and political economic focusing on the critical study of industrial relations. By the fourth and final year of these studies, an interest in ideology and policy analysis had developed and for the substantial final research dissertation, the topic of industrial relations in Scottish education was chosen, not least because the author’s father and his position as a principal school teacher allowed access to an educational environment for the collection of primary data. The resulting study consolidated this interest in policy, governance and their impact on social and economic relations, particularly employment matters.

These Scottish undergraduate studies offered exposure to a number of theoretical schools of thought that offered compelling insights into the construction, development and complexity of the social and economic milieu and taught him that many aspects of the world we grow up in should not be taken for granted. In addition to theoretical considerations of social organization, the early 1990s was an intriguing period in which to study political economy, the sociology of work and industrial relations in the UK. The era overseen by the post-1979 Conservative administration of Margaret Thatcher had had an immense impact on labour matters, not least the fortunes of organized or ‘institutional’ labour unions. Indeed, many academics at this time identified (often with discernable discomfort) how institutional pluralist industrial relations based on the establishment of a regulatory wage-work bargain was being replaced by a predominantly non-union management led American-inspired discourse of Human Resource Management (HRM) (see Keenoy, 1999).

As well as fears for the plight of labour, many commentators appeared to predict the demise of the critical study of workplace matters and industrial relations as a more pro-managerialist prescriptive agenda appeared to emerge in business departments of universities. Thankfully such fears did not come fully to fruition although the study of the workplace has perhaps had to undergo some development in the last two decades as will be dealt with later in this document (see also Ackers & Wilkinson, 2003). However, there can be little doubt that the managerialist agenda has dominated discourses in the contemporary workplaces as labour appears hampered by the fracturing of collectivism, turbulent labour market conditions and overtly pro-business governments (see Symon 2002 – Paper 3).

After completion of these initial studies, the author went to work as a research assistant in the Economic and Social Research Department of the University of Glasgow. He was involved in a number of projects but most notable were those investigating how communities and individuals coped with rapid and significant economic change. For instance in the 1980s Glasgow and its environs had witnessed a rapid decline in the heavy industry for which it was famous resulting in high levels of unemployment and widespread social exclusion. As such, the state had devoted resources to urban regeneration projects including labour market interventions such as retraining and
attempts to re-skill the workforce for the emerging service economy. Both the author’s observations and contemporary critical commentaries identified various problematics in these strategies but the author’s interest in such matters continued to develop.

In 1996 the author saw the opportunity to take up a research post at the University of Luton working on projects looking at management change in further and higher education and the notion of ‘widening participation’ in post-compulsory education for students from socio-economic groups who had not traditionally engaged in higher study. Numerous discourses emerged from this imperative. For instance: access to post-compulsory and specifically higher education as a means of enhancing social mobility and ensuring social justice; widening participation as a supply-side intervention in the labour market for forming the sorts of higher-level skills that, according to conventional logic, contemporary employers demand; as a means whereby HE institutions can compete for students (and the funding attached to them) in a competitive market; as a means of making more efficient use of public resources. The research conducted during this period yielded sufficient data for a number of conference presentations and publications, one of which forms part of this submission (see Symon and Fallows, 2000 – Paper 1).

In 1999, at the conclusion of these research projects, the author took up a teaching position in the Business School of the same institution. In this role, he taught organizational studies, industrial relations and training and development studies to undergraduate and - in time - postgraduate students. Furthermore, he was able to develop further the research interests he had pursued in his previous role: lifelong learning, labour market policy and the management of public sector institutions. Out of this emerged an interest in changing workplace organization and the construction of management technologies and discourses. Of particular interest was the then topical notion of the ‘learning organization’ (see Papers 2, 3, 4 & 5). The author formed the idea that state policy on lifelong learning and skills and tendencies in management thought in the 1990s had certain parallels. Furthermore, he sought to establish that notions of skills policy, skill formation and skill utilisation cannot be uncoupled from wider concerns for the politics of production.

Since September 2004 the author has been employed at the Business School of the University of East London as a Senior Lecturer in Human Resource Management. In this time he has sought to develop his teaching expertise in various areas and to consolidate his research profile. It is in such a spirit that he presents this doctoral submission. The five publications presented here do not constitute the entire output of the author to date. In addition to the work presented here, the author has been involved in a number of other research projects which have resulted in publications and presentations at conferences and symposia. These projects are related to some of the themes dealt with in this thesis but explore different trajectories.

An example of this work is Jones and Symon (2001) which explores lifelong learning from the perspective of leisure rather than work. It considers how liberal and non-vocational adult education has been marginalised in favour of vocational learning and how the apparatus of socially useful lifelong learning have been expropriated by the
needs of production. This paper was published in the journal *Leisure Studies* and has been cited widely in the field of the sociology of leisure. In addition, the author has looked at change in the voluntary sector and the experiences of volunteers under an emerging managerialist agenda in the voluntary sector (see Gammell & Symon, 2002). This research considers how institutional change has reconfigured the culture of the not-for-profit sector and thus the nature of volunteering. Both these strands of research are related to those in the thesis but were sufficiently divergent not to be included in the submission. However, it is contended that these papers selected demonstrate a journey of scholarly development which, if taken in aggregate, constitutes a distinct attempt to contribute to knowledge in the realms of the critical study of work, organization and their social and economic context.

### The thesis: outlining the arguments in the papers

#### Key theoretical frameworks

Five papers are presented in this thesis, published between 2000 and 2004: four peer-reviewed academic journal articles and one chapter from an edited volume. As mentioned above, these papers do not constitute the entire output of the author; however, they have been selected as they represent a distinct and coherent scholarly output and that they constitute a worthwhile contribution. This submission is titled *Institutions, learning and labour: state policy, management strategies and worker response* as it is felt that this collection of papers seeks to examine and to integrate these social science constructs.

#### Institutions

Institutions, whether of the state, commerce or civil society are a recurring theme in the papers which in particular seek to examine how they interact with each other and react to changing political economies, especially where there are controversies and dilemmas. As with many constructs in the social sciences, the term institution can have many definitions and connotations. In this instance, the term is intended to mean an apparatus of social and economic practices that reproduce patterns of behaviour. Such a notion would transcend accepted definitions of organization. Such a conceptualisation would lean towards a phenomenological categorisation as one which emphasises how institutions are formed and how the interact with their context and change over time (see James and Wood, 2006). The principal inspiration for institutional school of analysis is Weber, for many one of the originators of modern sociology (see Giddens, 1971). Weber concluded from his observations of the development of European capitalism in the 19th century and early 20th century that organizational forms would tend towards rational frameworks, the apotheosis of which was bureaucracy; the ‘iron cage’ of pyramidal

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3 Giddens (1971) credits Weber for inspiring the development of modern social theory. He also discusses Marx who considered the antagonistic relations between capital and labour and the ‘materialist’ development of history and who features in this thesis (see below); Durkheim is the third member of the triumvirate who conceptualised how societies cohere and the consequences of societal fragmentation, most memorably suicide.
hierarchy, regulation, process and record (Giddens, 1971; Thompson & McHugh, 2002). He concluded that the nature of the social relations configured by ‘protestant’ capitalism shaped organizations and institutions in this way.

It should be noted although the contribution of Weber to the development of social theory is universally acknowledged, many limitations were identified in institutional theory and more ‘behavioural’ explanations for human action became popular in the 1960s and 1970s (Warhurst, 1997). However, the study of institutions has been somewhat reinvigorated by the emergence of the ‘neo-institutionalist’ school of sociology (see Di Maggio & Powell, 1983; Warhurst, 1997) which takes a more sophisticated and less functional view of how institutions interact and cohere, retaining the Weberian impulse but in a reworked format. The ideas advocated by this school of how organizations in the same field come to resemble each other in terms of practice and strategy have some resonance for this thesis (e.g. on the search for legitimacy and standard responses to uncertainty). These phenomena are evident in many aspects of the research presented in this document. The institutional dimension is particularly useful as an analytical construct in the context of this thesis. The various phenomena under consideration such as the links between relations at the organizational micro level and forces at the level of the wider political economy – or macro level - are important in shaping the roles of institutional ensembles such as state and policy coalitions and markets. This in turn impacts on the behaviour of labour and management within particular fields (James and Wood, 2006).

Learning

Learning is arguably the most important construct throughout the selection, particularly in a social sense. As will be explained in more detail, learning (whether ‘lifelong’ or ‘organisational’) has become a prominent legitimating discourse both in the realms of policy making and management thought (Field, 1997). Learning can be conceptualised as a process which is individual (e.g. cognitive), collective (e.g. social, organizational), voluntary, coerced, formal (i.e. structured and designed, e.g. education, training) and informal (Huzzard, 2000). In terms of utility for this thesis, we are concerned with an interpretation of learning that relates to change in social systems, be those social systems workplaces, institutions or wider civil society. However, whereas learning is commonly presented as a benign phenomena, synonymous with growth and advancement, more critical interpretations consider how discourses of learning have emerged that seek to privilege the interests of production rather than the ‘learner’ or ‘learners’ (Keep & Rainbird, 2000). This has resonance with the studies by Willis (1977) of young male wage labourers which demonstrated the role played by the education system (along with other cultural and economic factors) in reproducing a working class.

In terms of recent policy manifestations of education and vocational training, the term learning has become synonymous with both with the effect that a number of forms have become conflated (Keep & Rainbird, 2000). Lifelong learning has become the primary vehicle for vocational skill formation in the UK and to a growing extent in other industrialised systems (Garsten & Jacobsson, 2004). Thus frameworks and discourses emerge that encourage (or for some, demand; Field, 1997; Garsten & Jacobsson, 1994)
continual updating and changing of skills, capabilities and attitudinal characteristics on the part of workers in response to production and market requirements. Similarly in managerialist terms, the term learning has come to denote the innovation, change and dynamism necessary in a competitive and fast moving global economy. It should be noted it is not just for the ends of capital that such conceptualisations of learning can apply; Huzzard (2000) has considered how the labour movement can put processes of organizational learning to use in order to build capacity to better resist the exploitation of capital. Ultimately, it is the role of learning in the politics of production (see Symon, 2004; Paper 5) that makes it a contested notion and a key theme in discussion of the labour process in the contemporary workplace.

Labour

Labour is used here largely in the Marxian⁴ or Neo-Marxian sense of those who work and in particular those who are employed (Braverman, 1974); the term is used particularly to denote workers in a collective sense or workers as a class, counterpoised and in conflict, in Marxian accounts, with ‘capital’. Labour is essentially a social group whose members have common characteristic that they sell effort (in a labour market) in exchange for a (principally pecuniary) reward (Thompson & McHugh, 2002). The term – influenced by sometimes partial knowledge of Marxian accounts (see Dahrendorf, 1959) - is sometimes understood to denote an exploited, downtrodden and disadvantaged group generally with poor education and limited life chances; often imagined as the proletariat or working classes engaged in manual and factory work. While this may apply to a certain extent, the developing research agenda on the workplace towards the end of the 20th century and into the 21st has demonstrated that skilled, professional and managerial workers are also subject to labour processes and experiences of control and exploitation by capital (Friedman, 1977; Thompson & Warhurst, 1998; cf. Wright-Mills, 1951). As such, these workers can be said to be engaged in a struggle, albeit with different dynamics and outcomes across occupations and socio-economic groups.

Labour can be organized, most commonly into unions who are charged with bargaining with employers on behalf of members to fix terms and conditions of employment. Radical scholars have viewed the historical development of unions and industrial relations as the ‘institutionalisation of conflict’, whereby the tensions that build up in the workplace due to the manifestation of the divergent interests of labour and capital can be channelled into these regulated structures of dialogue and pluralistic consensus (Fox, 1973; Kelly, 1998; Ramsay, 1977). However, dialogue and consensus can break down resulting in industrial dispute and in extreme cases wider social conflict between classes and the state (Dahrendorf, 1959). Outside of ‘institutional’ industrial relations, resistance by labour to capitalist domination can take many more tacit and less obvious forms based on either clandestine activity such as sabotage or absenteeism, or more psychological assertions of identity, self efficacy and engagement with power structures (O’Doherty & Willmott, 2001; Thompson & Ackroyd, 1995).

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⁴The term Neo-Marxian (and also Marxian) rather than Marxist is used in this document to clarify that the term is meant to denote a school of social theory rather than a political doctrine (see Gall, 2003).
To summarise, labour is a key theme in the selected papers either in an institutionalised (e.g. trade union) sense, in the sense of labour markets or as an analytical heuristic representing the subject of management strategies.

**State Policy, Management Strategies and Worker Response**

The sub-title *State Policy, Management Strategies and Worker Response* seeks to emphasise how the above terms are used and to give some idea of how the thesis seeks to link them. Indeed, it is a contention of this thesis that these three phenomena in the subtitle are inextricably linked and that these links are brought into sharp focus when viewed through the lens of learning as a component discourse of the labour process.

**Context**

Dealing with the first of these themes, our indistinct point of departure is the changing political economy of industry, work and society in the late 20th century, the period Giddens (1990) calls ‘Late Modernity’. This process has often – after Kuhn (1970) – been referred to as a ‘paradigm shift’ (see Symon, 2003; [Paper 4 of this thesis]). The changes affecting the societies of industrialised economies from the 1970s onwards have been framed in numerous different ways with emphases primarily conditioned by the ideological background of whoever is writing (see Jessop, 2002, for an extended critique). In terms of what can be as objectively as possible identified as the outcomes of this apparent paradigm shift generally consist of the following:

- Decline of manufacturing as the dominant mode of production.
- Reappraisal of the role and expectations of the state in production and the provision of social welfare.
- The demand for more fluid and flexible labour markets and associated varied experiences of work for workers.
- Dissolution or redefinition of the boundaries of ‘established’ socio-economic categorisations or ‘classes’.
- A diminished role for collective institutions such as trades unions as social attitudes tend more towards individualism and a disembedding from the collective.
- A more aware and confident consumer body willing to challenge and make demands of providers in both private and public domains.
- The pervasiveness of information and communication technologies.

These characteristics are taken from a varied selection of the most prominent accounts of late modernity (particularly Amin, 1997; Beck, 1992; Giddens, 1990). As such, there is some variation among commentators as to the causes and effects of such shifts and whether they give cause for optimism or pessimism (see Hirst & Zeitlin, 1991). However, there does seem to be a certain degree of consensus that these shifts have profound implications for individuals and their work, communities and institutions. As such, we can conjecture that labour markets and the complex apparatus of learning that plays an
increasingly key role in the reproduction of useful labour have been particularly susceptible.

Under the guidance of colleagues in his own and other institutions, the author found labour process theory (LPT) (Thompson & McHugh, 2002) to be a particularly useful framework with which to make sense of the emergent ideas in his scholarly endeavours. LPT is often referred to as a framework in that it sees workplace relations under capitalism as being inherently antagonistic, i.e. that in order to realise and sustain the production of surplus value, capital must exploit labour whilst maintaining the consent of labour. However, the nature of these relationships is highly complex, cannot be divorced from the wider political economic milieu and the agency of labour to resist this exploitation cannot be ignored. It was using such ideas that the author attended and participated in numerous International Labour Process Conferences (ILPC) as well as other critical organizational studies forums.

LPT in its purest form - i.e. in the work of Braverman (1974) and his ‘deskilling’ thesis – has been justifiably subject to considerable critique since it was published (see Thompson, 1990). In particular it was suggested that deskilling (i.e. the implementation of scientific management techniques and new technologies by employers to gain control of labour processes thus degrading the experience of employment for the worker) was not necessarily inevitable as suggested by Braverman, nor was it necessarily the sole strategic aim of managers in their attempts to sustain financial performance (see Warhurst, 1997). However, the contribution of scholars influenced by LPT (evident in the proceedings of the ILPC over the years) has arguably been among the most potent in the critical study of work and organization. As long as one does not take too dogmatic or reductionist a view of LPT, the general premise that work is a ‘contested terrain’ due to the antagonistic relations of production configured by the forces of production can, it is argued, result in fruitful insights.

For those writing from a managerialist or neo-liberal policy standpoint, the causes and effects of the developments above can be viewed in a positive light. This benign coincidence of technological and economic determined forces has been enabling in the sense that they have ushered in a brave new era where the shackles of collectivism (particularly of labour), over-regulation, inflexible production regimes and a poverty of ambition and imagination have been cast off (see Thompson & Warhurst, 1998). Instead this era seemingly offers opportunities – although threats are acknowledged in the literature; see Papers 3, 4 & 5 in this submission – for a democratisation of economic advancement and social fulfilment. Indeed, many commentators explain that if certain organizational and cultural circumstances are configured, then industrial conflict can be eradicated and a satisfying experience of employment guaranteed (see in particular Peters & Waterman, 1982; Senge, 1990). However, workers must engage with this new agenda and bring to work requisite attitudes, and crucially for this thesis, a high level of skills. The implication is that the onus is on the worker to invest in these skills with the employers seemingly sidestepping responsibility for formation of the skills from which they hope to profit (see Symon, 2004 [Paper 5]).
In terms of the role of the state in this discourse, it has been well documented that the emphasis in the policy agenda in the industrialised world has shifted since the 1970s from Keynesian social democracy (which, in conjunction with Fordist industrial policy was judged to be in crisis) to a policy agenda said to be influenced by neo-liberalism (Jessop, 2002). The economic and social climate and the agency of a radical New Right administration in the UK brought about far reaching change which sought to privilege markets and private enterprise and withdraw the influence of the state. For this thesis, and in particular Paper 1, there were two key outcomes of this scenario. Firstly that policy making on skill formation would shift from a collectivist/corporatist state-driven, employer-administered model associated with the era of trades and manufacturing under Fordism to one whereby individuals would assume responsibility for acquiring the skills required in the labour market (Field, 1997); lifelong learning was to become by the mid-1990s the principal basis for skill formation policy. Secondly, state institutions, not least providers of education, would be required to seek efficiencies and economies through more effective management as producer dominated, underaccountable bureaucratic monopolies would no longer be tolerated as state rhetoric privileged enterprise and consumer power and choice; this notion became known as the New Public Management (NPM) (Clarke & Newman, 1997; Hood, 1991; Pollitt, 1993).

Although the voices of the left are still reasonably potent in the critical study of work and organization (see Gall, 2003), they have continually had to compete with a potent managerialist agenda. Over the last three decades in boardrooms, management consultancies, the business schools of universities, the books of best-selling management gurus (see Keenoy, 1999; Legge, 1995; Ramsay, 1996) and even in the corridors of public policy-making and administration apparatus (see Clarke & Newman, 1997), the legitimacy of management under liberal capitalism has been established and reinforced. This process has been facilitated by the economic conditions and sympathetic public opinion and by the relative weakness of alternative voices in the labour movement (Keenoy, 1999). The use of the terms managerialist and managerialism in this document denote this agenda whereby discourses are presented that seek to establish consent in the workplace through a variety of organizational techniques and models (see Grugulis & Knights, 2001). This can be said to constitute an ideological position in the sense that the world-view of liberal capitalism is manifested in these ideas and practices (Legge, 1995). Thus managers seek flexibility and to engineer the attitudes and sensibilities of workers through ‘culture’ management programmes (Willmott, 1993) and corporate restructuring that often results in job-loss, a diminution of security in employment or conditions of work (Kelly, 1998). This agenda is evident in a context where work-stress and long hours of work have come to characterise the experience of employment for many (Warhurst & Thompson, 1998).

Despite the benign rhetoric of many managerialist discourses – particularly evident in the learning organization discussed in this document – they do little to eradicate injustice in the workplace and most certainly do not address the fundamentally antagonistic nature of workplace relations under capitalism. Indeed, it is somewhat ironic that a concept that has been identified as a means of achieving emancipation – learning – is put to use in
managerialist discourses to control and subjugate. It is this and other related critical matters that the following featured papers hope to address.

The Papers

The Papers in Summary

The papers that constitute this thesis (available in full in the appendix of this document) consist of four articles from peer reviewed journals and one chapter from an edited themed book.

Paper 1 is an empirical study of the experiences of adult learners in a UK university. It considers the preparedness of a higher education institution for engaging with a lifelong learning agenda as conditioned by state policy. Furthermore, it considers a public institution’s responses to an emergent consumer agenda as presented in the NPM literature.

Paper 2 shifts the focus away from lifelong learning in universities to lifelong learning in the workplace. Managerialist writers have expropriated and sought to capitalise on the liberal and emancipatory ethos of adult learning for managerialist ends, packaging it as the learning organization. This paper seeks to draw parallels between the concept of the learning organization and that of social capital, a construction that seeks to codify and channel the assumed moral economy of communities to achieve policy objectives.

Paper 3 takes an industrial relations perspective of the learning organization and seeks to provide a critique of capacity of management discourses – in particular the learning organization - to reconcile the underlying problematics of contemporary workplace organization.

In a similar vein to Paper 3, Paper 4 is an investigation of how management discourses are used to construct a rhetoric of unitarism and emancipation in the workplace while the underlying structural dynamics of labour processes prohibit any meaningful reconciliation of conflicts of interests and values and any meaningful emancipatory experience of work.

Finally, Paper 5 considers lifelong learning in the context of institutionalised industrial relations. Labour Process Theory is used to demonstrate how articulations of lifelong learning differ in the realms of public policy, management thought and the labour movement. Ultimately, any notion of consensus between these realms is questionable.

The papers will now be considered in more detail.
Paper 1

Background

Between 1996 and 1999 the author was employed as a researcher on a project to monitor the impact of policy initiatives aimed at widening access to higher education in England and also seeking innovative and more efficient ways of using resources in the delivery of academic programmes. During the course of these Central Government funded projects a substantial body of data was collected. The primary use of this data was reporting back findings to the funding bodies. However, the project team were also able to use this data in various publications, primarily in education policy and administration journals (see also Fallows and Symon, 1999; Fallows and Symon, 2000). Paper 1’s title is ‘Part-time HE study in Luton and its environs’ and it was published as a peer reviewed article in the Journal of Access and Credit Studies, a publication of the National Institute of Adult and Continuing Education (NIACE) in the UK.

The most cursory of glances the bibliography of Paper 1 suggests that the theoretical element to this paper is somewhat underdeveloped. This is so for two principal reasons. Firstly, the editorial guidance from the journal indicated a preference for more of a ‘research note’ format for a submission of this nature (despite the paper undergoing a process of peer review). Hence some of the theoretical discussion included in earlier drafts was scaled down (see Symon and Fallows, 1999). Secondly, the (first) author’s theoretical knowledge was yet to evolve to a satisfactory level of depth and sophistication. As such, much of the content of the paper is concerned with discussion of the empirical data at what is a descriptive level. However, despite these apparent shortcomings, retrospective analysis potentially illuminates some intriguing themes as is illustrated below.

The collaborator on this paper – Dr Stephen Fallows - was at the time of publication Reader in Educational Development at the University of Luton and part of the team working on the research projects from which the paper (as well as others from this period) is derived. Dr Fallows’s background is in the natural sciences and as such his primary contribution to the project was research management and method.

Theoretical focus

There is little overt theoretical discussion in Paper 1; indeed, in scholarly terms it is probably the weakest of the offerings presented in this thesis. However, the themes on which it touches did facilitate – indeed inspire - subsequent theoretical lines of enquiry. Furthermore, with hindsight we can see the emergence of some themes central to this thesis that would benefit from retrospective elaboration at this stage. In particular, two potential areas of social scientific interest are identified:

1. The changing political economy of society and labour markets and its impact on the policy agenda and stakeholders.
2. Developments in management strategies in relation to public sector institutions and the consequences for these institutions and their stakeholders.

It is argued that Paper 1 represents an embryonic attempt to examine how these two strands of social science thinking interplay. In the first instance it considers how the discourse of lifelong learning within a specific geography is received and manifested. Critical accounts of lifelong learning have expressed concern about how the adult and continuing education agenda has been usurped by capitalist imperatives. Rather than adult education apparatus being a vehicle for democratisation, emancipation and intellectual development and engagement it has been expropriated by the imperatives of capital for the opposite reason. Due to the failure of market approaches to skill formation (rather than co-ordinated employer-funded vocational models) the state has sought to promote lifelong learning as a means shaping a consenting and useful labour market. This rather displaces the more liberal ideals of lifelong learning (Coffield, 1999).

In Paper 1 it is implied that although the policy discourse of lifelong learning sought to maintain the impression that learning could be undertaken for reasons other than vocational training, it was clear from the research that motivations for learning were primarily vocational and instrumental (Jacobsson, 2004). Critical accounts of lifelong learning policy emphasise the expropriation of post-compulsory educational apparatus by the pecuniary imperative, a consequence of attempts by policy makers to engineer more flexible labour markets and to further marketise and individualise skill formation. There is an intriguing echo of the seminal work of Willis (1977) on how cultural values and economic chances are reproduced through experiences of education within the context of working class life under a Fordist industrial paradigm. In terms of the picture of the labour market on the cusp of the twenty-first century, we can conjecture how the culture of 'post-Fordist' labour is configured. Higher learning is seen as an instrument of engagement with the labour market, not as an activity that is emancipatory or associated with non-pecuniary self-fulfilment. It is a means of seeking to diminish risk by being employable (see Garsten & Jacobsson, 2004); the discourse has been established that skilling and employability are the responsibility of the individual worker. These conjectures are consistent with the critical social theory of economic activity.

The parallel strand of analysis involves a NPM agenda in a higher education institution. The project considered how institutions should respond to the new institutional context configured by the lifelong learning agenda as well as espoused desires for efficiency and innovation (Coffield, 1999). The NPM agenda has been investigated in some depth in higher education in terms of the impact of the forces of NPM on institutions and their philosophies, outputs and how they interact with stakeholders (e.g. Coffield & Williamson, 1997) and more specifically their impact on employees in academia (Barry et al, 2001). Paper 1 offers a rather more prosaic assessment but it is observed that the lifelong learning agenda and its drivers for flexibility and responsiveness on the part of institutions have serious implications for various stakeholders.

The institution in the paper is under pressure to change in the face of drivers from the ‘market’ of learners and in the face of lifelong learning policy (see Coffield &
Williamson, 1997). This market, as discussed above, is conditioned by production and
labour market imperatives. As such, an instrumental-cum-consumer mindset is evident,
an attitude which the axis of the neo-liberal and managerialist mindset has encouraged
(Clarke & Newman, 1997). There are clear implications for systems and structures of
institutions, not least in terms of when and how learning is delivered and the nature of the
delivery. There are also clear managerialist imperatives and implications for labour
processes within academia (Barry et al., 2001).

The summarise the theoretical context, is argued that Paper 1 is consistent with critical
accounts of labour market behaviour and skill formation and the NPM agenda in public
institutions and more specifically in higher education.

Methodological context

The empirical aspect of Paper 1 was the result of data yielded by two large-scale postal
surveys conducted in the autumn of 1998. The aims of these surveys were as follows. In
the first instance it sought to ascertain the attitudes and nature of the experiences of part-
time students at the institution. Secondly it set out to assess the ‘market’ for part-time HE
in the ‘catchment’ area of the institution (i.e. the surrounding region). These aims were
primarily conditioned by the terms of reference of the Central Government funded
project. As such, the philosophy and approach was clearly placed in the positivist realm:
the data was gathered as a response to what was in essence an educational experiment.

The two samples for these respective surveys can be described thus: (i) all undergraduate
part-time students who were at the time enrolled at the University (2644); 437 completed
questionnaires were returned (response rate of 16.5%); (ii) a ‘mail-shot’ to a list of 4000
thousand addresses in the counties of Bedfordshire, Hertfordshire and Buckinghamshire,
a region identified as the ‘target’ domain for student recruitment for part-time
programmes (n=400; response rate of exactly 10%); the mail-shot was shared with
marketing and publicity materials. As such, two questionnaires were developed. The
questionnaire for the current students was relatively complex and detailed and sought,
using closed questions, Likert scales and opportunities for respondents to expand. The
questionnaire for prospective or potential students was rather simpler to encourage a
greater yield, seeking to establish basic facts, particularly what respondents would like to
study and why.

For many scholars, positivist lines of enquiry of this nature have their limits. As Grugulis
and Knights (2001; 20) explain: ‘since Adorno [and his colleagues] initiated their debate
[on the course of German sociology in the aftermath of the 1939-45 war] positivism has
become a term of abuse applied by [many] social scientists’. Although this is a
particularly robust assessment, the limitations of positivism, and the merits of more
sophisticated approaches have become evident to the author.

Assessment of contribution
In the context of this thesis Paper 1 acted as a laboratory for the development of ideas and themes which would be expanded in the four papers that follow. In particular, the enhanced appreciation of the concept of lifelong learning and the policy making domain are both crucially important in this thesis. Furthermore, it seeks to examine the problems that public sector organizations and those connect to them face in attempting to respond to policy discourses and the imperatives of a ‘marketised/consumerised’ public policy environment.

The key contribution of this paper is that it demonstrates how notions of lifelong learning have been shaped but a new set of economic conditions. In particular the learners who appear to appreciate the need to learn but have been conditioned to seek what is seen as vocational learning creating an instrumental and consumerist relationship with the organization. Thus, within the context of the enhanced managerialisation of public institutions (Clarke & Newman, 1997), the managerialist response has been to seek to engage with learners as consumers, although in the case of the study in Paper 1, this was not necessarily handled competently.

Ultimately, Paper 1 demonstrates, albeit to a limited degree, the problems arising from the expropriation of lifelong learning by the pecuniary imperative and the issues facing institutions as they attempt to respond to a changing policy environment.

**Paper 2**

**Background**

The author’s change of position from research assistant to teacher in 1999 gave the opportunity for exploring a wider range of ideas and interface with a wider section of the academic community. As such, explorations of lifelong learning policy and the management and delivery of learning became somewhat more critical in their focus. Furthermore, exposure to this wider range of literatures, ideas and influences enabled a greater confidence to challenge conventions, especially those presented in official policy discourses and prescriptive managerialist texts. In Paper 2, a conceptual piece published in a journal read by both academics and management practitioners with specific interest in organizational and human resource development, the author sought to explore some of the epistemological origins of the notion of the learning organization by comparing it to a notion which had been acquiring some currency in the study of civil society and also in ‘third-wayist’ and neocommunitarian policy developments: social capital.

A common feature of managerialist texts, policy articulations and even ‘serious’ social science of the past two decades is that developed societies and economies, despite overall relative prosperity, are experiencing challenges to established orthodoxy variously associated with Globalization, post-Fordism, technological change and shifts in political ideology *inter alia*. Within these debates, deliberations on lifelong learning had led to considerations of the workplace as a place of learning, a component of the ‘learning society’ (see the debates in Garsten & Jacobsson, 2004). The development of a learning society is viewed as a quintessential paradigm of late modernity in which societies,
communities and individuals must reconfigure mindsets and institutional and organizational structures to cope with and prosper in a changing world. Such changes are usually presented in terms of Globalization, rapid technological development and shifts in the make-up of communities and economies.

Discourses of *Globalization*, post-Fordism and change in general are evident in both the learning organization and social capital (see Field, 1997). Communities experiencing turbulence or compromised by an apparent fracturing of social cohesion are diagnosed with experiencing diminished levels of social capital leading to lower levels of economic prosperity and poor health. As with the learning organization, the point of departure is adversity and the need to reconfigure radically both processes and mindsets for future survival and prosperity.

**Theoretical focus**

Arguably the most influential managerialist idea of the 1990s was the ‘learning organization’ (see Papers 3, 4 & 5 for fuller accounts). The essence of the learning organization is based upon both the premise that the operating environment of organizations in the final years of the 20th century (and by extension the early years of the 21st century) is extremely unstable, and a rediscovery of contingency theories of organization (see Thompson and McHugh, 2002). Prescriptive accounts explain that organizations must be structured in a flexible and dynamic manner and furthermore that the attitudinal characteristics of the members of the organization should be configured so that they can engage in a co-operative and innovative exchange of ideas. Thus prosperity is generated by mutual trust, quasi-democratic ideals and a capacity for learning.

Such notions, Paper 2 maintains, are also to be found in accounts of a social construct that gained some currency in policy circles in both Washington DC and London at the turn of the century, social capital. Social capital is seen as an abstract non-monetary exchange in a community setting whereby support networks and enhanced levels of civic participation and citizenship are in evidence. The mention of the term social capital makes many sociologists think of the work of Bourdieu (e.g. Bourdieu, 1984), in particular his definitions of his types of capital (originally stemming from his influential notion of cultural capital) and how they impact on the reproduction of cultural values, particularly through education. Although Bourdieu’s ideas are applicable to a certain degree when considering the factors that enable community cohesion and well-being, his brand of ‘reflexive’ sociology was not overtly influential on the North American writers who have been more influential in the domain of policy making (e.g. Coleman, 1988; Putnam, 1995).

The assumption is that economic prosperity will follow in communities with enhanced social capital. The principal writers are Coleman (1988) and Putnam (1995) whose ‘bowling alone’ thesis brought him international acclaim. ‘Bowling alone’ was a metaphor for how social capital levels in the USA had declined; whereas previously bowling was a communal experience, the fact that people had apparently started to bowl alone was indicative of a pernicious anomie in American society which if not checked...
would have profound economic and social consequences. The similarities in the learning organization and social capital are quite striking, despite them having evolved in separate realms.

It is suggested that the learning organization and social capital have common features as they are both articulations of attempts to solve the problems of a post-industrial (and some might say post-Fordist) society (see Hirst & Zeitlin, 1991). The passing of the Fordist era of production whereby a distinctive working class was organized around large-scale manufacturing undertaking a mixture of skilled craft and semiskilled work and living in proximity to their workplace has raised problems both for the management of workplace organization and wider communities. Willis (2001) explains how values in a working class were reproduced and how working class communities cohered, explaining how his studies of youth culture in the 1970s were conducted at the end of the ‘golden’ period of Fordism. Rather, he explains, social researchers must consider how ‘postmodern’ forms of community cohesion and identification operate. Parallel ideas have been explored by organizational theorists (e.g. Clegg, 1990) looking at the nature of cohesion in the workplace. The traditional working class has fragmented and the ‘rational’ means of organizing work have apparently become outmoded. The attentions of managerialist thinkers have turned to more ‘normative’ technologies of control in the workplace whereby strategies are intended to manipulate symbols, identities and cultural artefacts (Keenoy, 1999; Ramsay, 1996; Willmott, 1993).

Writers in the policy and managerialist realms have devised diagnoses for fragmentation and lack of cohesion in their respective constituencies and prescriptions for amelioration. Policy and managerialist thought should be seen in the context of ‘fashion’ in ideas (see Ramsay, 1996) but a common feature of prescriptions in the last two decades has been the desire to contrive a sense of commonality of purpose, interdependency and tolerance for adversity. These features are common to both social capital and the learning organization, suggesting a significant level of isomorphism and interchange between the two realms (see Di Maggio & Powell, 1983). Ramsay (1996) marked observed the extensive use made of management consultants not only by industry but also by governments. However, a further dimension of critical concern is the desire or espoused belief that phenomena that are either spontaneous or emergent can be produced artificially and that when they do emerge, they will serve the interests of capital and the state (see Willmott, 1993).

**Methodological context**

Paper 2 was identified by the editor of the journal in which it was published as a ‘think piece’ (in a personal communication with the author). In other words, it should be viewed as a theoretical exercise in ‘playing with ideas’. The essence of the analysis is a comparison of two prescriptive ideals for social organization from the respective genres of political science and management theory. In seeking to compare the two and subject them to critical scrutiny, the author was conscious of the technique of intertextuality (see Kristeva, 1980) which he had encountered when taking a class in literature several years previously. In its recognised sense, intertextuality is the shaping of a text by using the
framework of another text (the classic example is Joyce’s *Ulysses*) (Kristeva, 1980). Thus the construct of the learning organization was looked at through the lens of social capital and vice versa.

**Assessment of contribution**

This paper, although not substantial in length or weight, was instrumental to the development of the author’s thoughts on how the social and economic contexts affect how relations are configured in the workplace. Furthermore, Paper 2 presented an opportunity to explore the nature of ideas in both popular social and management thought and how they might be challenged. The tone of this piece was intended to be, if not exactly humorous, then slightly disparaging of the anodyne nature of certain aspects of both management and popular social writing. It is perhaps an intriguing irony that since it was published the notion of social capital has captured the imagination of both the UK policy making community and management theorists. In the author’s own work, the critical considerations of social capital featured in this paper have contributed to developments in papers other than those featured in this thesis (e.g. Gammell & Symon, 2002; Jones & Symon, 2001).

**Paper 3**

**Background**

Paper 2 sought to establish an element of the *Zeitgeist*\(^5\) in terms of both state policy and management thinking in terms of establishing sustainable competitiveness. In the 1990s there was a surge in the volume of management thought that sought to persuade on the possibility of a unitarist consensus in the workplace (Ramsay, 1996). As such, employers and workers could engage under a sophisticated set of circumstances and organizational apparatus to achieve optimal ‘performance’ and a satisfying and secure experience of work for employees. The optimistic hyperbolae of management gurus and the questionable assumptions being perpetuated by business schools were presenting a discourse of what was happening in workplaces that was not necessarily consistent with more critical accounts of the social sciences and particularly in the disciplines of organizational studies, sociology and industrial relations (Keenoy, 1999).

By the time Paper 3 was written the author had been teaching in a business school environment for between two and three years. There were enhanced opportunities to explore various ideas and literatures and to attend conferences. As such, the author was able to revisit, refresh and update knowledge relating to industrial relations, the focus of earlier studies. Far from being an extinct field, the study of industrial relations has evolved into a vibrant and important component of the social sciences. The author found

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\(^5\) The term *Zeitgeist* (literally German for ‘spirit of the age’) denotes an appetite in the public realm for a particular fashion or attitude. It is contended that such attitudes are configured by a complex configuration of values, economic conditions, technologies etc. It is further contended that tastes for managerialist techniques and increasingly policy initiatives are particularly susceptible to the whims of fashion (Ramsay, 1996).
great utility in using industrial relations literature for the purposes of critical inquiry into state policy, management strategies, workplace matters and experiences of workers in general. The point is made in Paper 3 that the notion of the learning organization had not been subjected to adequate critical scrutiny till this point and that this paper was an attempt to address this. Thus, the learning organization is looked at in terms of being a discourse which can be challenged.

Paper 3 seeks to examine the discourse of the learning organization (and ‘learning’ in the workplace in more general terms) in the context of more critical accounts of industrial relations, principally in the UK but ideally with implications across the industrialised world in late modernity.

Theoretical focus

In Paper 3 the idea of learning organization is challenged. In the 1990s, a substantial body of literature emerged that sought to counter what was seen as a developing managerialist hegemony of writing in the workplace, manifested in the emergence in the 1980s of human resource management (HRM) (see Keenoy, 1999). In challenging HRM, scholars (principally from the field of industrial relations) sought to either expose HRM as vacuous or as a rather more sinister means of re-engineering the employment relationship. Although the most productive era of these critiques has passed, the anti-HRM movement did, in some ways, reinvigorate debates about the workplace in the UK. It is in such a spirit that Paper 3 approaches the learning organization.

The learning organization emerged in the 1980s purporting to be a radically new way of organizing business for survival and prosperity in challenging circumstances. Using the idea of embeddedness Paper 3 seeks to identify the essence of the learning organization in the context of prevailing economic and political thought. In the first instance, the learning organization is challenged in its contention that it can provide a radically different and more humane (i.e. less exploitative) means of organizing work in a capitalist context. The work of Ramsay (1977) demonstrates that this has been a recurring feature of management for over a century and a quarter, explaining in his ‘cycles of control’ thesis that emancipatory rhetoric is cyclical and recurs depending on economic circumstances, particularly when employers need consent from workers in order to sustain production. Furthermore, the notion of the learning within the learning organization is rather misleading, with the seemingly humane accounts of Senge (1990) and his ‘Five Disciplines’ and Pedler et al (1996) and their learning company, when pressed, exposing an authoritarian edge; i.e. workers have little choice of what to learn.

Paper 3 suggests that there are four key components to the learning organization discourse: the turbulence that legitimates the discourse; the unitarism that is prompted by the turbulence (see the later Paper 4 in this thesis); empowerment which masquerades as democracy but according to most critical research is merely a rhetorical basis for work intensification (see Hyman, 2006 for a more recent account); this framework is supposedly held together by the fourth element, personal development, which far from being an emancipatory opportunity to learn and grow is frequently organization specific
socialisation (see Keep & Rainbird, 2000). Ultimately the learning organization is not the utopian reality suggested by the managerialist literature but is instead a means whereby the more unsavoury aspects of capitalism can be masked.

**Methodological context**

Paper 3 is largely theoretical in nature. In seeking to provide a critique of the managerialist orthodoxy of the learning organization, the author used the notion of embeddedness (Thompson & McHugh, 2002) in seeing phenomena in the sociology of the workplace in their historical and political context. In recent social theory, the work of Granovetter (1992) has probably been most influential in establishing a framework for the appreciation of the embedded nature of the social organization of economic activity. As opposed to other more functional forms of social theory such as rational choice or transaction cost economics or indeed more individualistic interpretations influenced by social psychology, the economic sociology proposed by Granovetter and his colleagues emphasises the strength of established networks and relationships that are conditioned by the social outcomes of economic activities.

This embeddedness is assumed in the challenge to managerialist thought on the learning organization and organizational learning by seeking to demonstrate that these versions of workplace life are deficient in failing to take account of embedded social norms conditioned by Anglo-Saxon capitalism (see also Warhurst, 1997). Thus the ‘battle lines’ (cf. Keenoy, 1999) of workplace conflict and labour processes are more enduring than managerialists would concede. In this paper there was a conscious attempt to challenge the conservative and elitist bias of much managerialist writing. ‘Mainstream’ and prescriptive management thinking – in academic and populist realms - has been the subject of critique by scholars from radical schools of thought in for its positivist and furthermore uncritical worldview (Grugulis & Knights, 2001).

Burrell and Morgan (1979) produced what is arguably the most influential attempt to date in European organizational studies to map and categorise analytical paradigms in which they defined and drew distinctions between philosophical approaches in research. At the centre of their categorisation is a distinction between ‘systems structural’ (i.e. positivist) and ‘interpretive’ (non-positivist) approaches (see also Huzzard, 2000; 29). The critique of the positivist approaches centres on the questionable efficacy of the assumption that the world as it impacts on people is mechanistic and independent of any human sense making. This argument is manifested at its extremities in a ‘postmodernist’ viewpoint (see Cooper & Burrell, 1988) where notions – especially notions from a perceived orthodoxy - of structure or framework in human activity and human experience are challenged. The postmodernist position concentrates instead on how an experienced reality is constituted through text and symbols; this approach also has strong similarities with what is referred to as the post-structuralist school of organizational analysis influenced by Foucault, discussed later in this thesis (see also Grugulis & Knights, 2001).

The author has some sympathies with the postmodernist critique of positivist orthodoxy. The capacity for received orthodoxies to become established and legitimated through
positivism – particularly managerialist orthodoxies – is enhanced. However, as many recent critics of postmodernism have suggested, rejecting any structure and form in the analysis of social and economic organization can often lead to ‘throwing the baby out with the bathwater’ to use a rather tired English cliché (see Thompson, 1990). Material inequalities and exploitation persist in the workplace and wider society that postmodernist accounts do not satisfactorily explain (Fleetwood, 2005). As such the author has chosen to draw on aspects of the modernist and postmodernist realms to form a perspective that maintains a moral framework but has sufficient intellectual sophistication to challenge and provide critical insight and have the elasticity to cope with change and complexity. Influenced by Cooper and Burrell (1988) and Huzzard (2000) (who are in turn influenced by Habermas (1996)), a ‘critical modernist’ approach is taken in this paper (and in Paper 5 later in this thesis). Returning to the use of Granovetter’s (1992) notion of ‘embeddedness’ discussed above, it is possible to use these quasi-structural notions in a critical manner as the environment which actors and institutions in the social organization of economic activity can be seen as having critical implications.

Assessment of contribution

Paper 3 was, to the best of author’s knowledge, one of the earliest attempts in the UK and the USA to challenge the learning organization as a construct, not merely using established Critical Management Studies (CMS) frameworks but through the lens of a recognisably industrial relations body of literature. This had the effect of putting the discourse of the learning organization in the context of the employment relation, subject to economic pressures, contradictions and exploitative behaviours. The fact that this paper was published in a journal that does not get a very wide industrial relations readership perhaps hampered its progress as a contribution in the wider realm of scholarship. However, it did help consolidate and set up ideas that were subsequently explored further in Papers 4 and 5 and in published work subsequent to that (e.g. Burgess & Symon, 2005a).

Paper 4

Background

Following on from the publication of Paper 3 research into the managerialist and policy discourses of learning and the contribution of a metaphorical collective ‘learning’ in social organizational circumstances that would create the conditions for sustainable high performance. The author continued to be vexed by the uncritical nature of these discourses in the form of consultants’ solutions, management texts (including in supposedly scholarly journals) and even public policy initiatives (see Garsten & Jacobsson, 2004; Keep & Rainbird, 2000). Some of the feedback from reviewers and colleagues that the author had received regarding his writing suggested that while attempts at critical enquiry were evident to some extent in the author’s work, the research might benefit from a less structuralist approach. As such, although the paper (for example Paper 3) acknowledged that managerialist discourses of learning and learning
organizations were flawed, an enhanced effort to ‘deconstruct’ these ideas would further the research. The author began to explore ways in which texts could be challenged to achieve a greater sense of meaning.

In parallel to considering how ideas could be explored through deconstruction, the author also became intrigued by the notion of ‘paradigms’ and paradigm ‘shifts’, themselves prevalent discourses in managerialist and popular social commentaries (see Burrell & Morgan, 1979; Kuhn, 1970). In doing so, it was hoped that ideas could be put in historical perspective and seen as being of their time or part of some socially constructed Zeitgeist. Literatures on the history of ideas were explored (although not always fully appreciated) and colleagues with interests in and knowledge of these areas were consulted.

The idea for Paper 4 came when at a performance of the Rossini opera *The Barber of Seville*. The plot of the opera is based on a play by Beaumarchais published in the 1780s in which a cunning servant gets the better of a pompous aristocrat. Although set in Spain, the play caused considerable controversy in France (as did its sister play the *Marriage of Figaro*) as it was seen to tap into revolutionary sentiments which were bubbling under and eventually exploded in 1789 greatly affecting the course of history. The narrative of the opera struck a chord. As the *Barber of Seville* represented the cusp of the shift of one paradigm to another (feudal to industrial) whereby a servant could subvert with confidence the taken-for-granted authority of the aristocracy, thus many contemporary writings seemed to suggest an equally profound shift, albeit with different consequences for class conflict. It was felt that these utopian notions of a ‘revolution’ in technologies, structures of economic activity and organizations, product markets and crucially relationships between workers and the work that they do should be challenged; in particular, the notion that the appetite for resistance and the struggle should vanish. Thus a critique of the unitarist assumptions of the learning organization within the context of notions of a paradigm was attempted.

As the author was developing the ideas in Paper 4, it was brought to his attention that David Boje, the eminent North American professor of organization theory, was planning a special issue of an esoteric new journal. The author was encouraged by a colleague to contact Professor Boje who in turn encouraged submission. The reviewer’s comments were lengthy and not entirely positive but nonetheless constructive. From these reviews the author was able to develop and revise the paper further until it was in what the editorial team saw as an appropriate condition to publish.

*Theoretical focus*

The 1990s saw the publication of a number of polemics from critical scholars of the workplace and management remarking on the apparent hegemony of management orientated and pro-management writing, research and business school teaching (see Keenoy, 1999; Legge, 1995; Thompson & Ackroyd, 1995). This privileged position of managerialist research coincided with the declining fortunes of the labour movement not to mention the apparent acquiescence of centre-left politics and the trade union
movement to an enterprise agenda (Kelly, 1998). The 1980s had been portrayed as the era of enterprise and during that decade and subsequently the role of management had been constructed and represented in a manner that did not sufficiently question the organizing logic of the workplace under capitalism.

The most vociferous answers to the problems of distorted accounts of the sociology of the workplace came from the labour process school of thought (see Grugulis & Knights, 2001) which by the 1990s had split into the polarised camps of the Foucauldians (influenced by the poststructuralist thought of Michel Foucault inter alia) and those influenced by Neo-Marxian strains of thought of which Harry Braverman (1974) was the figurehead. In particular, Thompson and Ackroyd (1995) in their attempt at a critique of the seeming lack of critique in social scientific accounts of the workplace and, in particular, the capacity for worker resistance and recalcitrance sought to review the matter from both camps. They conclude that, while Bravermanians at heart, they see how Foucauldians possibly had insight to offer in terms of accounting for resistance by those subjected to power relationships.

Labour process theory has had a somewhat controversial existence since Braverman’s famous text was published. He unfortunately died soon after publication; otherwise we would have possibly been able to read his responses to the successive critiques of his work. For instance, from North America, Burawoy (1979) and Edwards (1979) contributed that the nexus between labour and capital, although fundamentally antagonistic and exploitative, was a more complex ‘game’ (Burawoy, 1979) than Braverman assumed where workers consented and even colluded in their exploitation and where the politics of production on the shop floor were of a negotiated order mediated by internal labour markets inter alia. In the UK, Friedman (1977) similarly proposed that deskilling was not the only means whereby control could be maintained by management in workplaces, citing ‘responsible autonomy’ as an alternative strategy whereby (especially skilled) workers were granted discretion as a means of eliciting productive behaviours.

In the early 1980s scholars continued to develop the ‘labour process debate’ (Thompson & Smith, 2001); Kelly (1982) and Storey (1983) considered the wider range of strategies that managers had available to them to control production away from the employment relationship with Kelly describing a ‘circuit of capitalism’ where the labour process was merely one component. However, by far the most controversial episode in the debate has been the critique of the apparent Neo-Marxian bias in LPT by those writing from a Foucault inspired post-structuralist perspective (e.g. Knights, 2001; O’Doherty & Willmott, 2001). Of particular concern to the post-structuralists in the labour process debate were the concentration of Bravermanian scholars such as Paul Thompson on dualisms in their analysis such as ‘labour and capital’ and ‘structure and agency’ without problematising the assumptions underpinning them. Furthermore, the Bravermanians were regarded as ignoring the subjective experiences of workers and the socially constructed nature of discourse. However, robust replies have been offered by the likes of Thompson and Smith (2001), challenging the post-structuralists for blunting the radical edge of labour process analysis.
It is unlikely that there will be a reconciliation or synthesis of the two perspectives in the labour process debate; many critics have declared the school of thought redundant (see discussions in Smith & Thompson, 2001). Indeed, if any scholar is searching for a unified, coherent and dogmatic framework, they will have difficulty establishing a reliable set of tools and prescriptions. However, the scholarship produced by the labour process debate has created a body of work among which is some of the most useful theory in the sociology of work and organization. Therefore labour process analysis can be regarded as a ‘state of mind’ in research terms rather than a tool-kit and it is in such a spirit that it is used here. Indeed, without the radical edge of labour process theory, much of the business and management research undertaken would not necessarily provide a challenge to the legitimacy of management and capital.

What is striking about the significant proportion of management literature is its capacity to have an unshakable belief in its ability to persuade and not acknowledge that there may be valid alternative interests and values to their own. Indeed it is indicative of the apparent hegemony of the interests of capital that such perspectives have become so privileged in public life (Bradley et al., 2000). When considering the learning organization, we encounter a world view that is unashamedly unitarist to use Fox’s (1973) framework. Fox was considering the problems facing UK industrial relations which in the 1960s and 1970s were the cause of some considerable strife in the economy and civil society. He established a framework of perspectives that presented a continuum. At one end was unitarism, the conservative capitalist view that the imperatives of industry were paramount and that the interests of capital and labour should be the same. Counterpoised with this was pluralism which recognised that interests could be divergent but that institutional frameworks could be put in place to resolve the tensions and find a settlement.

Unitarism has been roundly rejected by most serious scholars; indeed the limitations of pluralism have been suggested by Marxian and radical scholars (see Burrell & Morgan, 1979). However, the striking feature of the learning organization (and many contemporaneous managerialist constructs) is that they display profoundly unitarist ideals. What distinguishes more recent constructs such as the learning organization from apparently archaic notions such as FW Taylor’s scientific management is that they tend to carry assertive legitimating discourses that explain that environmental circumstances (e.g. Globalization, new technologies, fickle consumer preferences etc.; cf. Keenoy, 1999) leave organizations and their members no choice but to ‘pull together’. However, rather than expressing these ideas in crude ‘take it or leave it’ terms, they express rather more seductive rhetoric in their attempts to win ‘hearts and minds’. The message in most learning organization writing (esp. Pedler et al., 1996; Senge, 1990) is that the conditions can be created for meaningful, creative and emancipatory experience of work.

Paper 4 suggests that these conceptions of unitarism require further scrutiny, especially with the faith that learning organization writers put in the ‘paradigm’ shift to create the conditions for their brand of unitarism. In the paper, it is suggested that unitarism is not a monolithic notion, but that these notions unified mission, purpose, interests and values
are actually conflations of a number of underlying assumptions about the nature of social and economic relations under capitalism. The paper conjectures in a tentative heuristic that there are four interpretations of unitarism: feudal unitarism (inspired by Figaro) which is unitarism configured by Weberian notions of traditional legitimate authority; hard unitarism whereby the authoritarian logic of the market is applied; pragmatic unitarism which is arguably not unitarism but pluralism, but where the parties compromise for mutual advantage (albeit asymmetrically); and humanistic unitarism whereby the subordinate party, through some emotional revelation in response to a charismatic superordinate entity, commit to a purpose.

In the discourses of the learning organization, the prominent writers tend towards the humanistic variety of unitarism; the same can also be said of earlier works such as Peters and Waterman (1982). However, the logic behind this aspiration is still profoundly based on modernist market contractual principles. The conclusion is made that despite the claims to novelty and ‘new paradigm’ thinking, the underlying assumptions remain the same. Drawing from Ramsay (1977), and as observed in Paper 3, this genre of management writing is perhaps best seen in terms of a fad, the flavour of which is configured by the wider social and economic context (see also Ramsay, 1996).

**Methodological context**

Paper 4 is a theoretical paper. As explained previously, it was ultimately published in a journal with a self-consciously ‘postmodernist’ emphasis (see Cooper & Burrell, 1988). This took the author to intellectual territory and a paradigm of analysis of which he was not entirely familiar. Paper 3 had sought to undertake a critique but for Paper 4, the level of critical challenge had to go deeper. In the methodological statement for Paper 3 above an account is presented of the respective merits of what Burrell and Morgan (1979) have established as the opposing sides in the debate between ‘modernist’ and ‘post-modernist’ approaches to the sociological analysis of organizational phenomena. Since the publication of Burrell and Morgan’s ambitious work, a controversial debate has taken place regarding the merits and limitations of various methodological assumptions and approaches in the social sciences and in particular, with regard to Burrell and Morgan’s work, in organizational analysis.

The author became aware of alternative philosophical approaches and curiosity was aroused by exploring poststructuralist approaches to organizational analysis as antidote to overly instrumental rationalist approaches. Particularly attractive in this school was the emphasis on deconstruction and discourse as methods of analysis (Cooper & Burrell, 1988; Huzzard, 2000). Furthermore, as Paper 4 was targeted at an audience that was self-proclaimed as postmodernist and a certain degree of editorial advocacy was instrumental in the methodological experiment that resulted. Attempted in Paper 4 was the invocation of the principles of what Burrell and Morgan (1979) term a ‘radical humanist perspective’. In doing so, the approach in Paper 4 sought to challenge the unitarist assumptions in the learning organization discourse. This was attempted through

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6 Poststructuralism is regarded as being related to postmodernism in the sense that ‘grand narratives’ and orthodox notions of truth are rejected and assumptions challenged (Grugulis & Knights, 2001).
deconstruction and challenging of the phenomena and the use of literatures that either had an identifiable poststructuralist basis or using research that had used poststructuralist methodological approaches to illustrate the narrative.

It is questionable whether the author’s ambitions of achieving a truly poststructuralist state of consciousness was achieved, a consequence of a lack of experience in this paradigm. As discussed in the account of Paper 3 above, the author’s analytical instincts are to assume a structural patterns in the social organization of economic activity (Granovetter, 1992) if not a predetermined, objective framework. As such, the attempted adaption of a postmodernist and/or poststructuralist mindset proved challenging. This is not to say, however, that any notion of critique was or should be forsaken. On the contrary, the ‘critical’ dimension was important in Paper 4. Indeed, as with Paper 3 the author’s use of ‘critical modernism’ as an approach whereby assumptions about the nature of knowledge and the interpretation of discourses are challenged but with an underpinning of an understood account of morality (see Fleetwood, 2005; Huzzard, 2000).

Assessment of contribution

Paper 4 was, in essence, an experiment. The opportunity to explore new literatures and look at workplace scenarios in a different way was a fortuitous one. The journal Tamara: Journal of Critical Postmodern Organization Science – now in its sixth year – has acquired a certain degree of idiosyncratic prestige. However, once more the most significant contribution has been to the progress of the author’s own programme of research. The key outcomes of this paper are a satisfactory critique of managerialist thought, and the development of a process of deconstruction.

Paper 5

Background

Paper 5 emerged as a result of research the author was involved with looking at issues in local governance, public health and community and voluntary groups in 2001 (see Gammell & Symon, 2002; Symon, 2005). Discussion with public sector trades unions revealed that they were becoming increasingly involved with what they called ‘bargaining for skills’ which consisted of campaigning for resources for training and development of their members. This they presented as both part of a social partnership agenda with employers, but also a strategy to enhance the earning potential and employability of their members. Such observations were reviewed in the light of greater familiarity with a small but emerging body of literature on the industrial relations of training. The potential was identified for meaningful investigation of the union lifelong learning agenda in the context of wider workplace relations.

Also at this time the author had become more familiar with labour process writing, a diverse body of literature that looked at relations in the capitalist workplace in terms of
contestation and struggle, originally stemming from Braverman’s (1974) accounts of
deskilling but more recently encompassing a variety of approaches (see Thompson &
McHugh, 2002). Indeed, it was the prospect of attending and participating in the
International Labour Process Conference (ILPC) that prompted the author to consider
unions and lifelong learning in terms of labour process theory (LPT). Within this broad
topic were numerous critical concerns. Firstly, how the union movement’s conception of
lifelong learning compared with state policy discourses, manifestations in institutions in
civil society and perhaps most importantly from the point of view of LPT, with
managerialist and employer conceptions. Secondly, how the discourses of social
partnership inherent in the union lifelong learning agenda related to the amelioration of
the condition of working people. Thirdly, to challenge further the rhetoric of the ‘high
performance’ managerialist constructions of learning.

The resulting paper was published as a chapter in one of a series of edited volumes which
have resulted from the ILPC conferences since the mid-1980s. These volumes are
generally considered to be influential in the critical study of workplace matters
(Thompson & Smith, 2001).

Theoretical focus

Papers 1, 2, 3 and 4 of this thesis consider the how notions of lifelong learning have
developed and have been manifested variously in policy terms and in managerialist
discourses. In doing so, it has sought to demonstrate that critical social theory could
illuminate the construct of lifelong learning that has become so influential in policy and
management thought. The fact that the voice of capital has become so influential (not to
say dominant) in the shaping of these policy and workplace organization debates is
indicative of the fortunes of organized labour in the last quarter of a century (Kelly,
1998). Labour has been somewhat weakened as a voice as the hegemony of capital has
been established through policy channels, representations in the media and business and
management education (and, in many respects, school education also) (Coffield, 1999).

In the 1990s the trade union movement established a programme of renewal whereby
they sought to re-establish legitimacy after a sustained period of rapid membership
decline connected to a programme of hostile legislation by a Conservative government,
structural change in the economy and society and a new-found confidence in managers
(see Hyman, 1987). This new outlook by the trade union movement, seeking
‘partnership’ with employers rather than adversarial bargaining encounters has its critics,
especially on the academic left (see Kelly, 1998). However, one intriguing aspect of this
‘New’ unionism is the growing tendency to champion the lifelong learning of workers
and to lobby the state and bargain with employers for time and resources for appropriate
learning opportunities ranging from basic skills for manual workers (e.g. numeracy and
literacy as championed by pubic sector union UNISON; see Rainbird et al., 2004) to
higher level technical skills on the part of the engineering unions. As of 2004 the union
movement had developed a coherent lifelong learning agenda, often implying that
employers were reluctant to co-operate with them despite the logic that better skills
would lead to higher productivity.
The unions’ activities should be seen in the context of tendencies in production arrangements whereby within the context of an apparently ‘global’ market, price competition by the developed world becomes less viable and the assumption is that they should seek to complete on the basis of quality which requires higher levels of skill (Lloyd & Payne, 2004). However, despite numerous high profile policy articulations of the ‘vision’ of the high skills / high performance economy, there are numerous barriers to its achievement in the UK. Not least among them is the fact that, as discussed initially in Paper 1 of this thesis and also in Paper 3, the UK has since the early 1980s had a market-based system of skill formation that absolves employers of any duty to skill the labour market, relying instead on ad hoc self interest on the part of firms or on individual workers to pursue their own learning for employability. This scenario is consistent with Beck’s (1992) ‘risk society’.

Unions seek to cast themselves in the role of workers’ champions in seeking to protect them from risk. However, one must caution against automatic assumptions of virtue on the part of the unions; rather their actions must be viewed in a political context and part of a strategy to restore legitimacy, not only in the classical sense of seeking to ameliorate the plight of the working classes but also in appealing to the state, public opinion and employers (Heery, 2003). Unions had previously been presented as barriers to economic performance by their use of militant shop floor industrial relations tactics (Cutler, 1992). Thus the union movement, by championing skilling, appears to be seeking the moral high ground by shaming employers by their poor record. Indeed, the consensus remains that the UK labour market does not have the skills to be competitive on the level to which it aspires (Lloyd & Payne, 2004).

So what insights does this scenario give us into the sociology of the contemporary workplace and the politics of production? The fact that the rhetoric of the ‘high-performance’ paradigm has become so influential in shaping policy and managerialist attitudes towards the workplace, the configuration of the employment relationship counterpoised with the ever expanding body of critical literature that sees these assumptions as being profoundly problematic is the point of departure. The recurring theme of the quasi post-Fordism scenario insists that Marxist and Neo-Marxist views of labour processes as being contentious and that, despite apparent ‘revolutions’ in production, the effect of management action in respect of production and the employment relationship is still to deskill and intensify work (see Warhurst & Thompson, 1998). Rather than the post-Fordist ideal providing a Utopian, fulfilling experience of work, again Beck’s (1992) risk hypothesis has relevance: economic and technological development and educational sophistication create assumptions of well-being, but the contemporary workplace continues to display insecurity, stress and alienation (Warhurst & Thompson, 1998).

The central theme in the exploration of this scenario in Paper 5 is, once more, learning; in particular how the articulations of lifelong learning, despite frequently common vocabularies, differ between those of employers (and by implication, those of the managerialist thinkers that influence management practice; see Ramsay, 1996) and those
of the trade union movement. At face value, the two espousals of lifelong learning appear to seek the same thing: a high skill, high performance, emancipatory experience of work resulting in mutual benefits through increased productivity (and by implication, profit) for employers and job security and enhanced earning potential for workers. However, a closer consideration of the respective discourses reveals the differing – and frequently opposing – emphases of the two camps. Paper 5 argues that these differences in articulation of the lifelong learning agenda can be understood by way of labour process theory, which sees skill in the workplace as being ‘contested terrain’ (Edwards, 1979). The metaphor of ‘contested terrain’ (and also ‘frontier of control’) developed by Edwards (1979) and supported by other Neo-Marxian scholars such as Burawoy (1979) and Friedman (1977) illustrates that the workplace under capitalism is seen in quasi-militaristic terms. That a worker’s ‘work space’ (constituted of tasks, duties and rewards but also identity and self-efficacy) has boundaries and these boundaries, as with nation states, can be subject to invasion by hostile forces in a power struggle. Employers – and by implication management – are identified as hostile forces. It follows that lifelong learning, as a vehicle for the reproduction of skills can be viewed as a ‘contentious element of the politics of production’ (Paper 5; Symon, 2004; 180).

Employers’ articulations of lifelong learning owe more to the ‘learning organization’ as discussed in Papers 2, 3 & 4, a programme of faux humanisation of workplace discourses where learning encounters are determined by employers for employers (often short-term and ill-considered) ends (Keep & Rainbird, 2000). Furthermore the skills-sets being promoted are often presented as ‘soft’ skills seeking to engender appropriate attitudinal characteristics appropriate to contrived corporate cultures rather than technical capabilities (Willmott, 1993). The employer articulations of lifelong learning are, paradoxically, in many senses deskilling. Employers seem unwilling to invest in human capital that workers might take with them to benefit competitors; this is a scenario that other economies such as Germany and Sweden have sought to overcome by collectivising and co-ordinating skilling arrangements to their economic benefits (Streeck, 1989).

With regard to union articulations of lifelong learning, it is clear that they seek higher transferable skill-based learning for workers that would seek to realise the much-vaunted high-performance paradigm. Indeed, all of the major UK unions are seeking to organize around skills as an area of pragmatic interest to members. In contrast with frequent employer (and Labour government) representations of the unions as inhibitors to economic progress, much research has established that where unions have successfully bargained for more training, organizational performance has been enhanced; a true manifestation of social partnership, albeit in antagonistic circumstances (Dundon & Eva, 1998; Streeck, 1989).

The impact unions will have on the UK lifelong learning and skilling agenda will be limited as long as the prevailing social context remains in place that privileges the imperatives of short-term liberal capitalism (Lloyd & Payne, 2004). Unions have no formal position in skill formation and the present political climate seems not to favour a return to a regulated and co-ordinated model of skill formation. It is the contention of
Paper 5 that the ‘high-performance’ paradigm will remain an unrealistic dream as long as this is the case.

Methodological context

Paper 5 was a largely theoretical paper albeit using secondary data in the form of policy documentation produced by the trades union movement, state and employers. The experiments in Paper 4 with the fringes of post-structuralist thought were not repeated in Paper 5. However, the author consciously sought to maintain a critical dimension after the notion of critical modernism (often associated with Habermas, 1996). In pursuing this, the author, as in Paper 3, sought to prioritise the notion of embeddedness, seeing the ‘dialectic’ on lifelong learning in its historical, social and political context (see Littler, 1980; 157). As such, the issues in Paper 5 cannot be understood outside of ‘the totality constituted by capitalist society and the mode of production in particular’ (Thompson & McHugh, 2002; 16). Thus the analysis of the policy documentation and literature that formed the basis of the source material for the study in Paper 5 had to be qualified by this overarching context.

Labour process theory (LPT) has been somewhat criticised since its recognition as a significant dimension of sociological analysis in the 1970s (Thompson & McHugh, 2002). However, the author viewed it as being sufficiently robust and indeed malleable to cope with the demands of the line of enquiry in this paper. The conception of the labour process saw the struggle for control of the workplace (qualified by incidences of consent implied in social partnership discourses) in the articulations of lifelong learning and evidence of implementation and practice in the research referred to.

Assessment of contribution

Of the five papers in presented in this thesis, the author considers Paper 5 to be the most satisfactory in terms of the level of scholarship and its exposure. As stated previously, the series of edited volumes from the annual ILPC have been established as an influential account of the ‘state of the art’ in the sociology of the workplace. The author feels privileged to have been included in a collection, especially as the other chapters by the fellow authors in the volume exhibit scholarship of the highest order.

In terms of the scholarship in the author’s offering, although there is little evidence that this chapter has been influential (although it has been cited in passing in other research) the volume of research on unions and learning has grown considerably (Burgess & Symon, 2005a). Although this is unlikely to be due to Paper 5, the author can take some satisfaction at having identified an important avenue of research when in its infancy.
Overall assessment of thesis and concluding thoughts

It is hoped that the commentary in this document is seen as an honest account of a strand of the author’s work. As such, there has been no attempt to obscure the limitations of the papers, especially in the case of the earliest offerings. It should also be apparent that the work presented does represent a ‘journey’ of scholarly development - by no means yet at a wholly satisfactory destination – and that the experiences of that journey constitute a coherent contribution to what is without doubt a crucially important domain of social scientific enquiry. Furthermore, this thesis has sought to demonstrate the problematic nature of contemporary policy and managerialist discourses of learning. In such spheres learning is regarded in uncritical terms as anodyne and uncontested, especially with regard to production and employment.

This thesis culminates in a position which can be summarised in the following terms. In order to understand how workplace relations are configured and reproduced, one must examine the wider institutional environment in which they occur; how markets and hierarchies impact upon the state and how the state seeks to facilitate the reproduction of labour and mediate crises in production. Within this is the notion of the labour process, the politics of production and the workplace as a contested terrain. Learning, in its guise as a route to skill formation in the contemporary workplace, has been highlighted as an example of a contested notion. The state, employers, organized labour and workers themselves as agents all present and seek to configure their respective notions of learning which can vary considerably despite attempts through rhetoric to establish unified versions. Employers with the collusion of the state seek to use discourses of learning to control, whereas what workers seek (and are often conditioned to expect) is emancipation and personal growth.

It is the contention of this thesis that these often privileged managerialist and policy discourses of learning are inhibiting a more meaningful understanding of relations in the contemporary workplace and within the social organization of economic activity. If there is one single contribution of note that should spearhead this claim for doctoral status, it is that the author has argued passionately about the importance of learning; that it is central to democracy and the health of a society and its capacity to develop. However, in order for this to happen, managerialist manipulation and ill-considered state intervention must be challenged.

It is hoped that contained in this sample of the author’s published work is evidence of an original and valid contribution to our understanding of the social organization of economic activity. Also, it is hoped that the writing demonstrates a willingness to learn and not to be constrained by any particular scholarly dogma or narrow set of literatures, but to explore and innovate. As such, the author sometimes feels awkward categorising himself in a particular disciplinary genre: on the one hand, there are components of sociology; on the other, political science; and then again, political economy. Ultimately, this categorisation is not necessarily of any great importance; indeed, an integrated approach to the social sciences is perhaps no bad thing.
The chronological format of the presentation should also demonstrate a process of learning whereby the limitations of the earlier work has been acknowledged and built upon. The author acknowledges that there are limitations in the later work; indeed it is acknowledged that he will still be learning if still in employment in thirty years time. This is a view of lifelong learning that sits in stark contrast to the perspectives which are subject to critical scrutiny in this thesis. Rather than being a vehicle for emancipation and personal growth, as idealist traditions educational thought maintain (see Field, 1997), managerialist and policy articulations are ultimately about control, conformity, intensification of labour processes and the legitimisation of insecurity. This is an agenda that educators must challenge.

The context and future

Although the papers in this volume seek to represent a central and coherent strand to the author’s research, they are not necessarily representative of the totality of his output. The author has been involved in other – albeit linked – areas of research in this time and subsequently. The work on the voluntary sector has been particularly engaging to the author (Gammell & Symon, 2002). Furthermore, although Paper 5 (Symon, 2004) represents the most recent significant publication by the author, he has been involved in subsequent research, although it should be noted that since taking up his post at the University of East London, teaching and administrative duties have precluded a sustained writing effort. One collaboration which has proved fruitful since 2004 is with UEL colleague Pete Burgess looking at change in German industrial relations. Although this work has yet to be formally published, it has been well received when presented at conferences (see Burgess & Symon, 2005a; 2005b).

The development of a research trajectory into the international realm (see Burgess & Symon, 2005a; 2005b) gives cause for particular excitement. Transferring ideas to a different social and economic system (in this case Germany) presents certain challenges (see Warhurst, 1997) but the prospects for applying ideas to new domains are potentially promising; indeed the lifelong learning discourse is becoming evident in a number of national systems and this presents further prospects. In parallel with this is the work being undertaken with a UEL colleague into the emergence of community unionism, the first results of which have been presented to the public domain (Symon & Crawshaw, 2007). Similarly, this research builds on work contained in this thesis on social and economic change and institutional response.

The endeavour with colleagues at the Universities of East London and Luleå has resulted in the submission of this thesis and given cause for optimism for worthwhile scholarly activity in the future. Furthermore the foundations have been laid for continued research with colleagues Dr Jon Crawshaw (on new forms of community union organization) and Pete Burgess (on industrial relations and skill formation in Germany and the UK). Involvement with the Organization Studies Network and the Dilemmas in Human Services conferences, both co-organized by colleagues at UEL, Staffordshire and Luleå has been greatly beneficial.
Working in UK universities (and, one suspects, those in other European countries) one is aware of continued pressure on resources and the apparent imperative to teach more students with less staff. This is not always a suitable environment for worthwhile research to flourish. While it is for others to judge whether the author’s research is ‘worthwhile’, he nonetheless feels grateful for the opportunities he has been given (not least a significant period of ‘research leave’ in early 2007) and remains optimistic for future prospects.
References


Appendix: the papers
Paper 1:

Part-time HE study in Luton and its environs

Implications for providers, recipients and beneficiaries

Graham Symon and Stephen Fallows
University of Luton

Abstract
This paper outlines findings from two surveys undertaken by the University of Luton during 1998 and seeks to examine the potential contribution of part-time HE in a localised setting. The first survey of current part-time students at the University focused on the individual learning experience. The second was a market research questionnaire distributed to several thousand homes in Bedfordshire, Hertfordshire and Buckinghamshire. Both surveys provided a useful indicator of the local population’s demand for and expectations of part-time HE. It can be assumed that there are significant potential social and economic implications for the provider and recipients of part-time HE.

Introduction
Part-time study within UK HE is of increasing national importance. Official statistics indicate a doubling of part-time student numbers during the decade to 1997 (HESA, 1998). Numbers are likely to continue to rise, particularly with the national push for lifelong learning and continued professional development (DfEE, 1995, 1998; Fryer, 1997; National Committee of Inquiry into Higher Education, 1997). In the authors’ local context of the University of Luton, demand for part-time study is projected to grow by 20 per cent in the period 1998/99 to 2002/03.

The nature of part-time students and part-time study
The shift to modularised programmes of study has blurred the hard distinction between full-time and part-time study. Part-time students may be defined in a number of different ways: for instance, in terms of the number of modules being studied at a particular time or with respect to financial matters such as fees paid and eligibility for certain state benefits. The definitions used vary from institution to
institution and there is a degree of confusion about what exactly is a part-time student.

For this paper, part-time students are defined as those on taught undergraduate and postgraduate HE programmes for whom study is not the principal occupation, ie the student may combine study with full-time or part-time employment and/or family responsibilities. Furthermore, the study load (measured in number of modules taken at a particular time) for a part-time student will be lighter than that typical for a full-time student; thus, the length of time taken to achieve an educational objective, such as a degree, will be significantly longer. This definition utilises a pragmatic recognition of the student’s own perspective since it is recognised fully that many considered to be full-time students also engage in paid employment and/or have family responsibilities.

The profile of part-time students indicates a very diverse (although not necessarily representative) body in terms of ethnicity, disability, socio-economic background and prior education (HESA, 1998). However, the most striking distinguishing factor is the age range. Whereas the majority of full-time students in the UK are under 25 years old (approx. 75 per cent), 83 per cent of part-time students are over 25 years old. Ninety-six per cent are over 21 years old and therefore classified as ‘mature’ students (HESA, 1998). Of part-time students, 57 per cent are over 30 years of age. It follows that the motives for study, needs and perceptions of part-time students differ from those of full-time in terms of curriculum, modes of study and resources.

The modes and patterns of attendance for part-time vary to a greater extent than the full-time equivalents. For example, there may be specifically designed part-time programmes delivered either during the day or in the evening. Alternatively, if an institution operates a modular programme, the student can take modules almost on an ad hoc basis as desired and accumulate credit over a period of time. Part-time study is not limited to face-to-face tuition: many work-based, distance and open learning programmes exist, the largest of these being operated by the Open University.

The subjects studied by part-time students in the UK are skewed towards vocational disciplines, suggesting career advancement as the primary motive. This assumption is consistent with international research conducted for the OECD. O’Connell (1999, p 2) found that ‘The incidence of participation in job-related training is substantially higher than that in education and training undertaken for personal interest and other reasons’.

Business, management and administration are the most widely studied distinct subject groups. Since nursing education has been included in the HE sector, health care studies have also been a widely studied subject group with engineering, technology and computer science also prominent. Social science and humanities
disciplines are studied but not in the same proportionate numbers as in full-time HE (HESA, 1998).

The following sections of this paper will seek to appraise and examine the experience of one institution, the University of Luton, in addressing the needs of part-time students.

The experience of part-time students
The University of Luton has around 6,500 part-time students engaged on a wide variety of programmes ranging from short certificate courses taken for continued professional development, through the undergraduate modular credit scheme to postgraduate certificate, diploma and masters programmes. The primary differentiation of part-time students is with respect to the number of modules being taken at a particular time. In addition, many of the university’s research students study on a part-time basis.

The largest group of part-time students participates in the undergraduate modular credit scheme and this group provided the information presented here. A postal survey was conducted in 1998 of all students registered for undergraduate modules. A total of 2644 questionnaires were distributed, 437 were returned. This represents a 16.5 per cent response rate.

The survey was conducted as part of the evaluation of a HEFCE-funded, experimental extension of teaching into the summer period (Fallows and Symon 1998, 1999) and was designed, primarily, to yield information on the level of interest, perceived benefits and perceived difficulties associated with summer study. The opportunity provided by the evaluation exercise was taken to gain information on these students’ current personal experience of part-time study and to gain feedback on any difficulties experienced.

Respondents
The ‘typical’ part-time student at the University of Luton is a married (or cohabiting) female aged between 25 and 40 years with children. She is in employment, and this is likely to be full-time employment. She lives within easy travelling distance of the University. Part-time study is most likely at levels 2 and 3 (rather than level 1) as many use part-time study to top-up earlier qualifications to a degree.

In practice, although the ‘typical’ student exists, it is important to note that part-time students are not typical and standardised. The unifying feature is that study is additional to external commitments rather than being the prime life commitment (as it is for traditional full-time students). This difference makes study of part-time students particularly important for the planning and future organisation of HE.
**Issues**

Information on issues relating to the part-time student experience was gained through an open question. The respondents were asked to identify issues of concern. If part-time provision is to be developed further, these issues must be addressed and resolved by HEIs.

Certain issues (both 'complaints' and 'compliments') were local matters and thus specific to the University of Luton, to particular departments or campuses. However, many issues apply generally. These generic issues are addressed here. The following paragraphs discuss the key issues and illustrate these with quotations from survey respondents.

There is a common perception that universities undervalue part-time students. This perception arises because facilities and services provided (from libraries to social areas) are targeted at full-time students whose needs are quite different.

Part-time students are treated as second class to full-time students, this situation should be improved as a matter of urgency.

(Male, BSc Building Surveying, Level 3)

More consideration needs to be given to part-time students who are generally in full-time work

(Female, BA Community Practice, Level 3)

Part-time students are particularly concerned since many pay their full-cost fees and are not eligible for any grant support. Part-time students have greater difficulty with the administrative procedures of the University. Communication is difficult, as the students are off the premises for most of the week. Time-tabling is a particular concern since the part-time student generally has to make specific arrangements to attend classes (scheduling time off work and childcare arrangements). Part-time students record that the greater the notice given of changes, the easier it is for these arrangements to be straightforward and not conflicting.

My main concern for part-time students who work full-time is that modules are not geared towards them, in respect of some modules not being allocated to one day. They are generally spread over the week, which makes it difficult to get time off. Ideally it would be of great advantage to the part-time student to have two modules with lectures and practicals on one full day.

(Male, BSc Mapping Science, Level 3)
It would be helpful if lectures and seminars are held on the same day as I only get one day off per week.

(Male, BA Psychology, Level 2)

A major problem is not knowing the exam dates until the date is more or less here. Can cause problems with employers to get time off at short notice.

(Female, LLB Law, Level 3)

As a part-time student working full-time, it is not always easy to get assignments [to the University’s central hand-in point] on time. It would help if some alternative arrangements could be made.

(Female, BSc Computing and Information Technology, Level 1)

Access to certain resources
Part-time students schedule their studies around work and family. Thus free time available for use of library or computer centre may be Sunday morning (when the student is not at work and when a partner or spouse can look after the children). But, this may be a time when these facilities are not available. Similarly, students needing access to specialist equipment for project and dissertation work find that laboratories and similar facilities are only available on a 9-to-5 basis when the technician is on site. Although this restriction is imposed for safety reasons, it fails to help the part-time student.

In my subject (engineering) it can be difficult to obtain access to the labs outside normal hours.

(Female, BEng Engineering, Level 3)

The library needs to be open at weekends, this is the only time to use it properly. Lectures finish during the week at 9.30 leaving ½ hour to take books out etc. Some of us live too far away to drop in after work. It needs to be more flexible even if it was only opened in the mornings on alternate weekends.

(Female, [not stated], Level 2)

Due to the location of my home and work, I am unable to get to the library at another time [ie other than when in University for lectures] and thus I need a high standard of availability.

(Female, BA Professional Practice, Level 3)

Conflicts of interest arise between the demands placed on resources by full- and
part-time students. One example is access to computing equipment. Part-time students have limited time and can be frustrated in their studies by full-time students utilising resources for apparently trivial activities such as email or ‘surfing’ the Internet.

It is often forgotten, that most full-time employed students cannot get extra time off work and therefore cannot ‘come in tomorrow and use the facilities…’ – especially so if ‘popping’ down is a three-quarter-hour drive
(Male, BEng Integrated Engineering, Level 3)

I have great difficulty gaining access to the Learning Resources Centre when I am given mock tests to do – many students are just using computers to send emails! Even the early evenings are problematic – I would need to get on the computers early morning or late evening, which is difficult for a working person.
(Female, BSc Health Science, Level 2)

As stated previously, part-time students juggle home, work and study. Respondents were frustrated by the impossibility of long-term planning. They largely join programmes along side full-time students (who remain the majority) and the University’s policy demands that modules are only delivered if numbers are deemed viable. For semester 1 modules this final decision cannot be taken before early October (particularly the case for Level 1 modules); but part-time students need to plan well ahead of this.

At the beginning of each semester, it’s very annoying to find that lecture times have been changed or room numbers, at the last minute. In the 3 years I have been attending I have always missed some of the first lectures – something I hate to do. I always come into the University the week before it starts to take down the new time-tables, so I can make arrangements to have time off work accordingly, only to change everything at the last minute.
(Female, BA European Language Studies, Level 2)

We need more advance communication re tutorial dates for the whole course so we can make arrangements re holidays and time off work.
(Female, DipHE Nursing Studies, Level 1)

The University lecturer’s job demands that much of the working week is spent away from the office – preparing or delivering courses and engaging in research and other matters. The part-time students find it particularly difficult to maintain contact with lecturers on a regular basis.
Positive thoughts
The previous section highlighted issues. The survey was designed to give the
students an opportunity to moan and express complaints about issues important to
their studies. These concerns have been revealed to the wider world because the
authors believe they identify generic matters. Our students have collaborated in the
spirit of improving the circumstances of those who follow – regardless of
institution.

From the issues highlighted, it might be assumed that the University of Luton
has failed its part-time students. However, the survey did encourage students to
criticise. There is also testimony to good and supportive practice, respect and
admiration for the teaching staff. For example:

I have found the following:
1. All lecturers [are] helpful and no different with older students.
2. No real problems with average students (ie 18–21 years).
3. I have really enjoyed the modules I have studied.
4. Head of Department is approachable.
5. I have enjoyed the mix of foreign students.
I do feel that in encouraging part-time students that the university has
opened a New World for me. Well done Luton.

(Female, BA European Language Studies, Level 3)

Lessons for all institutions offering higher level part-time study
We believe that the needs of students studying part-time at the University of Luton
are essentially similar to those studying elsewhere. The students surveyed were
enrolled on a wide range of undergraduate programmes; they were taking
advantage of the opportunities offered by the University-wide modular credit
scheme to build their degrees over an extended period of time. They were not
enrolled on programmes with specific focus on the needs of part-time students
(although certain health care modules do attract a mostly part-time enrolment).
Two options for positive future development exist: a) separate programmes
established to cater solely for part-time students; and b) acceptance of the different
needs and requirements of part-time students. The third option of ‘do nothing’
should not be acceptable; however, there are colleagues who would argue for a
continuation of the status quo.

Simple steps would assist the part-time student greatly. The following are a few
of the more obvious:

• Part-time students need time to plan their studies – or rather time to plan and
  organise their personal and work lives around their studies. They need notice of
timetables and assessment schedules (particularly examinations).

- Part-time students want to use facilities at different times and days of the week than traditional undergraduates. Saturday and Sunday are appropriate for access to libraries and computing facilities.
- Timetabling of different elements of a module (lecture, seminar and practical) on different days through the week should present no difficulties for full-time students but can be a nightmare for a part-time student. Everything on one day allows for sensible study days.
- Part-time students’ other commitments need to be recognised when scheduling the opening hours for all student services.
- Part-time students’ other commitments are year-round and many do not see any logic in education’s summer closure and would favour ‘year-round learning’. (This is briefly considered in the next section.)

Summer study
The survey was part of an evaluation of experimental summer delivery of courses and this evaluation will be recorded more fully elsewhere. At the date of the survey, this study option was not available to the majority of part-time students. However, it is worthwhile to record that part-time students judged this possibility very positively. For services other than education, a suspension for three months is not even considered.

Part-time students predicted the key benefits from year-round study as: faster progress to completion; continuity; and even distribution of study.

The principal difficulties envisaged by part-time students included: personal holiday arrangements (including covering colleagues’ holidays) and childcare during school holidays.

Following experimentation with several models of summer delivery, the University has launched a number of degree programmes, designed for part-time students, that operate to a model of ‘year-round learning’.

The needs of potential local part-time students
In the spring of 1998, the University’s Marketing and Public Relations Unit surveyed several thousand homes in Luton and its environs to ascertain likely demand for part-time study. The survey was a brief ‘tick-box’ questionnaire attached to an information leaflet that outlined some of the University’s part-time courses. Four hundred valid responses were returned. Although the sample was relatively small, the data returned does indicate the nature and extent of interest in part-time study.
Profile of respondents
Almost 90 per cent expressed an interest in part-time study. There was an even split between male and female respondents: this is consistent with national statistics for students in part-time study (HESA, 1998).

The age of the respondents also mirrors the UK part-time picture in that the largest band is between 26 and 40 years of age. This is when career development or enhancement is pursued most actively. The age distribution mirrors that of the current part-time students. A very small number of respondents were aged over 60 and likely to be retired. The Government (DfEE, 1998, p 10) has observed that: ‘[Learning] will help older people to stay healthy and active, strengthen families and the wider community, and encourage independence.’ If there is a case for increased participation of older students, then institutions should take steps to increase awareness of opportunities.

The demand: which courses and how should they be delivered?
Current HE funding requires institutions to demonstrate the financial probity of their activities. Thus, it is prudent to consider ‘market demand’ when developing courses. Table 1 details the preferences of our respondents. Respondents could select more than one preference from the areas listed. (This is consistent with the University’s approach to joint honours degrees and major/minor combinations.)

Table 1 Course preferences

<table>
<thead>
<tr>
<th>Type of course</th>
<th>Percentage of respondents expressing interest</th>
</tr>
</thead>
<tbody>
<tr>
<td>Built Environment</td>
<td>5.3</td>
</tr>
<tr>
<td>Business</td>
<td>34.5</td>
</tr>
<tr>
<td>Design</td>
<td>11.8</td>
</tr>
<tr>
<td>Health Care</td>
<td>11.3</td>
</tr>
<tr>
<td>History</td>
<td>8.8</td>
</tr>
<tr>
<td>Information Technology</td>
<td>36.0</td>
</tr>
<tr>
<td>Languages</td>
<td>14.8</td>
</tr>
<tr>
<td>Literature</td>
<td>5.8</td>
</tr>
<tr>
<td>Management</td>
<td>22.3</td>
</tr>
<tr>
<td>Media</td>
<td>9.3</td>
</tr>
<tr>
<td>Psychology</td>
<td>10.3</td>
</tr>
<tr>
<td>Science</td>
<td>10.0</td>
</tr>
<tr>
<td>Social Studies</td>
<td>11.5</td>
</tr>
</tbody>
</table>

Note: Individual respondents were permitted to chose more than one option.

n = 400
Information Technology and Business were the two most popular choices; not unexpectedly, both are vocational in nature. The Humanities disciplines, Literature, Media and History were less popular. Psychology, Health Care and Social Studies are slightly more popular: students may associate these disciplines with a particular career such as social work or a clinical field. Technical subjects such as Science and Built Environment attract less interest.

This survey allows discussion of whether certain types of course and modes of delivery appeal to particular prospective students categorised by gender and age.

**Gender and choice of course**
Gender was not a significant factor in course preference. Only minor gender variances occurred in subject choice. Information Technology was slightly more popular with male respondents than with female and the Humanities disciplines were slightly more popular with female respondents. However, the findings do not suggest that specific courses should be targeted to the general public on the basis of gender. It does not follow that certain courses do not have a significant gender imbalance: nursing and health care courses tend to be overwhelmingly female, whereas for engineering males predominate. This reflects the fact that the occupations associated with these courses remain dominated by a single gender.

**Age and choice of course**
The overwhelming majority of part-time students are classified as ‘mature’, ie over 21 years of age on entry. This is very different from the full-time student profile. The authors have sought to ascertain to what extent the age of the respondent influences choice of course and mode of delivery. The data suggest that age is a significant factor in the choice of course and mode of delivery. The most popular course choice was Business Studies and indeed this was the case for all age groups. Peak interest in the most popular (vocationally related) subjects was at 41 to 45 years. A lesser peak was apparent with respect to IT at age 56 to 60 years. With respect to the preferred mode of delivery, the responses illustrate that educational priorities can change with age.

The assumption has been made (see earlier and O'Connell, 1999), that the principal motivation for part-time study is to improve and enhance career prospects. Thus, professional courses and accredited qualifications will be less attractive to older students, and this is verified here. The most popular option among the older respondents is the short course rather than the professional course or the credit-bearing courses that ultimately lead to a qualification. This suggests an interest in ‘learning for the sake of learning’ rather than for any career enhancement. This phenomenon is encouraging for policy makers keen to see the concept of *Lifelong Learning* applied literally. There is also significant interest in short courses among
‘middle-aged’ respondents and also in the 36 to 40 age group. However, the least enthusiasm for short courses is with younger people at the start of their careers. Overall, the short course is the most popular choice. Interest in Professional courses peaks with the 26 to 30 age group before slowly declining as the respondents’ age increases. This phenomenon is mirrored with credit-bearing courses, which supports arguments about the ‘usefulness’ of education in relation to age.

**Conclusion**

The authors have examined the development of part-time HE in their university and the experience of its students. As the growth of part-time HE continues (the University of Luton predicts a 20 per cent increase in the next five years) institutions need to alter their approaches to course provision in order to cope with demand and to serve the needs of students. This is an issue that has been considered by other authors such as Coffield and Williamson (1997), Watson and Taylor (1998). The authors’ findings support the need for a significant reappraisal of provision; as society and the economy shifts and the expectations of the individual, employers, government and society in general shifts with them.

Although the surveys and findings detailed in this paper only apply directly to one institution, the authors believe they have relevance for the whole of the sector. The fundamental issues that have arisen are as follows:

- There should be recognition of part-time students as a distinct group with different needs to those of full-time students (eg attendance patterns, timetables and assessment). There may even be a case for a network of HE institutions dedicated to the needs of this group.
- There should be adequate support for part-time students in terms of learner support, guidance and learning resources.
- Administrative and logistical procedures and planning should take account of part-time students’ needs.
- Institutions may have to revise accepted conventions such as the academic year and consider alternatives (eg summer academic provision).
- The courses available and their curricula should take account of and reflect the needs of actual and potential students as well as other stakeholders such as employers.
References
Paper 2:

The learning organization and social capital: an unlikely alliance?

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**Introduction**

The relationship between economic success and social welfare is a well-worn scholarly path: Hume, Smith, Carlyle and countless subsequent others up until the present day have produced a significant output on the issue. It would therefore be a somewhat futile and superfluous venture on the part of the author of this essay to attempt either to confirm or to refute the work of these great minds. However, there is another potential area of synthesis of the worlds of capitalist and liberal thinking that has hitherto been identified to a certain degree (e.g. Fukayama 1995; Field, J. 1997; Jarvinen 1998) but not extensively examined: the creation of a learning organization and the promotion of social capital. Logic would imply that the exposure of such a conceptual link would provoke a reaction that would perhaps represent one of the few instances in which a neo-liberal and a Marxist would be in agreement; that the two entities appear to be mutually incongruous. However, it is not so much compatibility that is sought in this discussion, but rather a means whereby similarities, either literal or metaphorical, can be identified between the two concepts in parallel, and their dynamics and characteristics.

The conceptual similarities appear to stem initially from some of the diagnoses of and remedies to what are thought to be distinct challenges facing both commerce and society as a whole. While much of Western society has been experiencing poor health, poverty and alienation in many of its regions (Wilkinson 1996), it has been suggested that commerce has been challenged by rapid change, technological innovation, increased competition and globalization (Garratt 1987). While these phenomena inhabit quite different disciplinary spheres and are normally examined through different analytical paradigms, a minor theoretical leap of faith can take one to a position where it is possible to identify common strands not only in the dynamics of management theory and social policy, but in proposed solutions to issues therein. In the case of commerce, embracing organizational learning has been identified as a means whereby an organization can cope with the external turbulence it faces (Garratt 1987); in the case of civic society, enhanced social capital is seen as a key to combating social inequalities and improving quality of life (Campbell *et al.*
1999). These mechanisms will be examined in parallel and it will be considered whether the apparent instrumental similarities that exist in them are coincidental or linked.

**Similarities**

**Fundamentals**

For the purposes of this discussion, the learning organization will be considered principally in the context of the familiar work of Senge (1990) with significant reference to that of Pedler et al. (1991) and, indeed, that of other authors as required for theoretical clarification. Social capital is a rather less familiar term in HRD circles. Although Fukayama (1995) and Coopey (1998) have examined very closely related concepts in organizational contexts relating to issues of trust, democracy and organizational performance, the analytical perspectives employed in these cases differ slightly from those being used here. Essentially, social capital should be regarded as the web of relationships which operate at the meso-level of society, enabling individuals to carry out actions more successfully than if they did not have access to these relationships (Coleman 1994: 300). The principal authors on social capital, such as Putnam (1993, 1995) and Coleman (1988, 1994) stress the notions of activity, education, information, community, networks, civic engagement, democracy and empowerment in a complex and ethereal entity to define; social capital is not merely (for example) the execution of one’s right to vote and the joining of the freemasons, just as the learning organization is not merely the result of an increase in training.

In charting the theoretical syntheses of the learning organization and the promotion of social capital, a useful point of departure is the consideration of what has prompted the phenomena to have come into existence and subsequently develop. In very general and vague terms, the instigations in both cases could be said to have been environmental shifts that have resulted in more severe and challenging conditions for existence than have been experienced in bygone halcyon days. As mentioned above, the learning organization is widely recognized to have stemmed from a necessity to combat the effects of and adapt to technological change, increased competition and globalization, whereas social capital is thought to be a useful tool in combating poverty, unemployment, crime, disillusionment and alienation. In both cases, there is an implication that life has somehow become tougher for organizations within the economy and individuals within society. These environmental shifts perhaps differ in nature: while the turbulence which a would-be learning organization experiences is
thought to be primarily external (Senge 1990) (from the macro environment), it appears possible that the challenges facing a community or society could be from the macro and/or micro environments. However, speculation on the precise nature of the problems facing any society is far outwith the scope of this theatre of discussion.

Empowerment

Perhaps the most striking common feature between the learning organization and social capital, according to the rhetoric, are the closely linked notions of empowerment, participation and involvement. In some of the more utopian visions of the learning organization, the empowerment and involvement of the members of the organization are a key component with all members of the organization sharing common visions within a unitarist framework (Garratt 1987; Senge 1990; Nonaka 1995). Similar sentiments are espoused by the language of social capital, especially by Putnam (1993, 1995) when utilizing the work of Jacobs and Tocqueville, and echoing that of Pateman (1970) and even John Stuart Mill (1991). The idea that the individual should be active, responsible and even creative – an entre or intrapreneur – whether in a commercial or social context seems to be a relevant one in both scenarios. Recent reappraisals of the learning organization have questioned the extent and virtue of the empowerment and involvement that occurs (e.g. Coopey 1996; Laurie Field 1997; Snell and Chak 1998; Schein 1999). It has been suggested that, rather than having democratizing qualities, the learning organization represents a means of coercing and gaining appeasement; admittedly, that latter reservation has also been expressed of pluralist-style industrial democracy (Ramsay 1977). Indeed, another potential pitfall of the learning organization, social capital and indeed pluralist industrial democracy is the onset of indifference (Ramsay 1977; Putnam 1995; Coopey 1998). If the actors are not motivated to participate, the success of the respective endeavour could be considerably hampered.

Community and collectivity

Putnam (1993, 1995) and Coleman (1988, 1994) both stress the importance of community in the creation of social capital. The concept of community has also been used reasonably widely in its more metaphorical sense in the case of the learning organization (e.g. Lave and Wenger 1991; Brown and Duguid 1991) and at this point the synthesis of the concepts is perhaps at its most potent. Components of community such as commonality, relationships, sharing, communication and values have appeared in learning organization literature and these are entirely consistent with the language used in much of the social capital literature. It is not merely within the realms of metaphor that the similarities can be seen to exist; teamwork is a vital aspect of learning organization theory (Senge 1990; Pedler et al. 1991). If one views these teams as quasi-communities, a
further link can be established. The ‘quality-circles’ of the late 1980s and early 1990s (Black and Ackers 1988) compare rather tidily with the South Korean ‘study-circles’ identified by Coleman (1994) and, incidentally, tie in with the issue of empowerment discussed above.

Teamwork and community have, however, been the subject of some negative comment. In the case of social capital, one does not have to look too far back into history to a time when many societies used civic engagement in the form of associations and societies as a form of control and coercion, such as in the cases of pre-war Germany and Italy, and the Soviet Bloc. The often-cited Foucault (1977) wrote of the potential of a group to, by means of ‘power-knowledge’ instruments, discipline itself according to the appropriate social constructs and punish any dissenters who do not behave as they should.

Learning

It is perhaps rather obvious to state that learning is the quintessential component of the learning organization. However, Bourdieu (1977), Putnam (1993), Coleman (1988, 1994) and John Field (1997) have suggested that learning (albeit mostly in the form of education) is also a vital component of social capital. Development, communication and skilling have been recognized as being common to both concepts, although perhaps for quite different reasons. Indeed, this is perhaps where a crucial antithesis occurs. In the case of the learning organization, learning is undertaken to facilitate change and for the organization continually to reinvent itself and never to stagnate (e.g. Argyris and Schön 1978; Garratt 1987; Handy 1989; Senge 1990; Nonaka 1996). It has been suggested that the object of social capital is to create a sense of security, order and structure for the members of the community (Coleman 1988, 1994; Putnam 1993, 1995; Cohen and Fields 1998), virtues which are quite alien to the advocates of the learning organization.

Final thoughts

Metaphor is a well-utilized instrument in the social sciences and in the fields of management and organization in particular. What we have perhaps encountered with the two concepts featured in this essay is a series of ‘mutual metaphors’, where words like community, empowerment, learning and even capital are interchanged, falling outside their pedantic definitions in order to facilitate definition. However, there are perhaps some instances where actual literal similarities could be established between the learning organization and social capital. One has to be very careful of using a word like ‘literal’ when discussing what are largely (if not completely) theoretical and intangible entities. Allan Ramsay, one of the great figures of the Scottish Enlightenment of the late eighteenth century, wrote in his Dialogue of Taste: ‘No analysis can be made of
abstract beauty, nor of any abstraction whatsoever. One wonders what he would have made of an attempted analysis of two abstractions simultaneously.

However, reconciling the ethereal nature of theory is something that scholars have to come to terms with every working day. Of the learning organization and social capital and their apparent similarities, it is perhaps not surprising as they are both products of human institutions and as such are perhaps manifestations of a common socialization (Giddens 1991). Despite the instances of synthesis, and those of antithesis, the common denominator perhaps lies in the key vulnerabilities of the concepts. Achilles in this instance would appear to have two heels: the need for trust (Coleman 1988; Handy 1996) and the need to combat indifference (Putnam 1993, 1995; Coopey 1998).

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References


Paper 3:

Abstract  The concept of the learning organization has been prominent in management thinking in theory and practice for the past decade, with many books and articles being written in both North America and Europe and many employers in both the private and public sectors embracing it in their employment strategies. Becoming one is seen as a key to combating – and indeed thriving in – uncertain and adverse operating conditions. The last few decades of management theory have seen an explosion in constructs which carry significant amounts of persuasive language and the learning organization is no different. This paper attempts to problematize the learning organization in terms of the rhetoric inherent its theory. First, it charts where the rhetoric has come from and, second, identifies and analyses certain leitmotifs that are discernible in much of the prominent literature: turbulence and change, unitarism, empowerment, and personal development. Ultimately, this paper attempts to map conceptually the implications of the rhetoric for the employee in the learning organization.

Keywords: learning organization, rhetoric, critical analysis

Introduction

The learning organization, like its relative, human resource management (HRM), has captured the imagination of many scholars and practitioners in the sphere of management. Just as in the late 1980s and early 1990s, when many personnel departments became human resource departments and their heads sought to acquire a ‘strategic’ role in the organization, many employers during the course of the 1990s have sought to become learning organizations. The popularity of the learning organization as a concept was triggered by the publication of a number of influential texts around the turn of the 1990s (e.g. Garratt 1987; Handy 1989; Senge 1990; Pedler et al. 1991; Garvin 1993). These works developed the learning organization from the concept of organizational learning (see Argyris and Schon 1978) and explained how it could be harnessed and used to an organization’s benefit in becoming more ‘knowledgeable’, flexible, adaptable and better equipped to survive in, and indeed thrive upon, the ‘turbulent’ operating conditions that confront the contemporary organization. These accounts struck similar chords to those so percussively hammered by the ‘excellence’ model prescribed by Peters and Waterman (1982) a decade or so before, especially in the case of Senge (1990) whose The Fifth Discipline was an international best-seller.
HRM had no equivalent ‘blockbuster’ to Peters and Waterman (1982) or Senge (1990), but the early writings of Fombrun et al. (1984) and Beer et al. (1985) provoked a substantial amount of scholarly writing that continues to this day. This was especially the case in the UK where a number of eminent academics began to write very seriously about the new approach to the management of the workforce and a number of journals with ‘human resource management’ in the title appeared (see Legge 1995). What subsequently occurred was an intense debate about the nature of HRM in theory and practice that yielded a substantial degree of critique (Keenoy and Anthony 1992; Legge 1995; Sparrow and Marchington 1998; Keenoy 1999). Similar treatment has been received by other management initiatives such as ‘excellence’ (Guest 1992), total quality management (TQM) (Knights and McCabe 1998) and business process re-engineering (BPR) (Case 1999). The learning organization may perhaps not have had such a thorough going-over in critical terms but many of the issues that have been addressed in other similar initiatives are evident, especially the issue of seeking to induce behavioural change.

The overwhelming majority of readily available writing on the learning organization is prescriptive and positive, espousing the benefits to any organization of seeking to become one. Various dynamics of organizational learning have been examined (Bateson 1973; Argyris and Schon 1978; Levitt and March 1988; Boje 1994; Nicolini and Meznar 1995; Huysman 1996; Easterby-Smith et al. 1999) and some writers have warned of what can go wrong if you do not go about building your learning organization properly (e.g. Garvin 1993). A much smaller – but growing – body of literature exists that examines critically the holistic construct of the learning organization in terms of where it has come from, what it is meant for and the language that is used to describe it. This paper attempts to draw together and develop some critical issues and problematize the rhetoric of the learning organization and examine what the very persuasive sub-constructs actually represent.

First, this paper attempts an epistemological analysis of the general construct of the learning organization using its scholarly and practical origins and developments in the context of the wider ideological framework. Second, it identifies and maps conceptually four key rhetorical devices that express leitmotifs through the literature of the learning organization. Ultimately, the potential is identified for the rhetoric to be used for legitimization of authority and control, which are sentiments quite at odds with those expressed in most of the literature.

The construct of the learning organization: origins and purpose

In considering the nature of the learning organization one must first consider where the ideology has come from. The last twenty years have seen a rapid expansion in management thinking on ways of achieving greater organizational effectiveness. Many of the resultant ideas have come and gone, having perhaps failed to deliver or having fallen victim to the faddishness of managers (Ramsay 1996). However, many of these initiatives have certain recurring themes and are very heavy on rhetoric (Marchington 1995; Thompson and O’Connell-Davidson 1995; Webb 1996; Case 1999). Themes such as flexibility, change, anti-bureaucracy, the commitment of the workforce and the
aim of competitive advantage seem to be there in much of the writing, whether it is on ‘excellence’, quality circles, TQM or HRM. These themes are general and tend to vary, but a claim common to them all is that they are *panaceas*, cures to the ills facing the organization. This is just how the learning organization has often been presented (e.g. Marquandt 1996; Pedler *et al*. 1996).

The issue of how ‘learning’ should be a component of organizational effectiveness is perhaps unclear to those not versed in the subtleties of the learning organization. As the ‘post-industrial’ era became fully realized, the acquisition and management of knowledge were identified by a number of authors as being more important to commercial success than industrial capacity (Drucker 1968, 1993; Nonaka and Takeuchi 1995; Nonaka 1996). Also, towards the end of the 1970s, the influence of Japanese methods was beginning to grow as the momentum of Japan’s economic performance increased (Burchill 1997). The consensus had developed among managerial writers that a change of philosophy was necessary in order to survive, that the status quo should be challenged. The ‘double-loop’ learning of Argyris and Schon (1978) acquired a special relevance under this new order, challenging the governing variables of actions rather than merely the means of executing actions.

Hence, writers such as Garratt (1987), Handy (1989) and Senge (1990) were able to construct their solutions to the problems of growing uncertainty and adverse operating conditions. Also, during the mid-1980s in the UK, the now defunct Manpower Services Commission (MSC) commissioned Pedler, Burgoyne and Boydell to investigate new ways of working, the result of which was the *Learning Company Report* (1988), subsequently developed into a successful book (Pedler *et al*. 1991, 1996). Pedler *et al*.’s (1996) model of the ‘learning company’ is constructed from evidence of good practice that they gathered from an extensive empirical investigation, the result being an idealist and utopian prescription of how UK industry can achieve harmony, productivity, flexibility and competitiveness. Due to its empirical underpinning, the *Learning Company* of Pedler *et al*. (1996) has somewhat more credibility than the visionary, if at times under-specified, account of Senge (1990), but the ideas are susceptible to rhetorical manipulation nonetheless, as will be explained later in the paper.

The learning organization is now thoroughly established in the UK as a managerial initiative, synonymous with change and success (Jankowicz 2000). It is viewed by many managers and writers as a thoroughly virtuous concept, with employers and employees benefiting in a mutual exchange: enhanced competitive advantage for the employer and more rewarding and satisfying work for the employee. This notion is not only problematic in its assumption that a win/win situation is so readily attainable (discussed further in the next section) but also in the sense that its humanist rhetoric appears rather to flout the conventional wisdom of management practices during ‘turbulent times’. Ramsay (1977), in his influential ‘cycles of control’ treatise on quasi-Kondratieffian patterns of worker participation in the UK from the late nineteenth century onwards, demonstrated that incidences of industrial democracy correlated with periods of macro-environmental adversity. However, his investigations of the nature, extent and duration of this participation suggested that the willingness of employers to engage in a democratic partnership with the workforce may have had little to do with social justice and rather that motives centred around pacification of the labour movement and gaining compliance.
Ramsay has subsequently adapted his paradigm of analysis (Ramsay 1996), suggesting that, subsequent to the structural shifts and changes in political climate that handed the initiative to employers, much of the proliferation of management thinking has centred on implementing (frequently ill-advised and futile) mechanisms of gaining commitment from employees. Indeed, this phenomenon has been identified by other authors who perceive attempts to re-engineer the psychological contract and the labour process (Thompson and O’Connell-Davidson 1995; Thompson and Warhurst 1998). Ultimately, what many critical authors have identified is that, during periods of adversity, the tendency has been to seek to exert more control on the workforce rather than to enhance the quality of their working lives (Barley and Kunda 1992). As De Greene states:

Perceiving increasing threat and feeling growing anxiety, power holders try to rationalize their organizations to the maximum extent. This is done through advanced technology, through increasing the numbers of staff advisors and analysts, and through the neo-Tayloristic methods of operations research/management science, behaviour modification and psychological assessment.

(De Greene 1988: 14)

Advocates of the learning organization would certainly argue the toss over the association of their model with the term ‘neo-Tayloristic’. However, if one considers that the essence of Taylorism was control, and then considers Jankowicz’s (2000) conceptual cybernetic exploration of the potential to use the learning organization to control the workforce, parallels can be drawn.

De Greene’s reference to staff advisors interestingly mirrors the sentiments of Huczynski (1993a) who cites consultants as the perpetrators and perpetuators of new initiatives. Indeed, many of the leading writers on the learning organization work or have worked as consultants. This is certainly true of Mike Marquandt whose book *Building the Learning Organization: A Systems Improvement to Quantum Improvement and Global Success* (1996) contains a number of case studies on how employers have transformed themselves through becoming a learning organization. One of these case studies was the automotive manufacturer Rover, which, at the time of writing, is being forsaken by its owners BMW after a series of substantial loss-making years, with the likelihood of many redundancies, but which as recently as 1996 was being praised by Marquandt thus:

Rover has grown and benefited immensely over the past five years as an emerging learning organization. There has been a continuous flow of improvements initiated and generated though learning by empowered employees. Learning has indeed resulted in a better bottom line, happier employees, and a superior globalwide reputation.

(Marquandt 1996: 208)

Hindsight is, of course, a wonderful thing, but this extract demonstrates how a supposed panacea, or ‘magic wand’ (Marchington 1995: 51), may not be quite as potent as the rhetoric would suggest. Marquandt explains that the ‘journey to becoming a learning organization’ (1996: 194) was responsible for the atypical profit made in 1994. This may or may not be so, but that level of performance was not subsequently sustained; the one swallow did not make a summer.
Other dubious high-profile examples of learning organizations include Motorola whose ‘Motorola University’ received praise from Pedler et al. (1996), but in 1995 ceased much of its manufacturing in its native USA, shifting it to countries where production was cheaper (Schied et al. 1998), such as Scotland. The same was true of the domestic appliance manufacturer Whirlpool, who shifted production to South America (Schied et al. 1998). In their capacities as learning organizations, these employers and the ideology on which their initiatives were based espoused notions of engagement, commitment and unitarism. Alas, it seems that these values were to apply only to the employees, casting substantial doubts on the rhetoric as an entity with which employees could be expected to engage. However, the purpose of this paper is not to scrutinize whether the learning organization ‘works’ or not, but rather to examine its nature and components.

This section has attempted to deal with the nature of the construct of the learning organization. As with other constructs, such as its relative HRM (cf. Keenoy 1999), it is worthwhile attempting to break down the learning organization into identifiable constituent parts in order to further aid understanding. This paper now turns to such an examination.

The rhetoric of the learning organization: a four-point framework

Rhetoric has been defined as persuasive discourse and thus attempting to shape the perceptions of others with language. Rhetoric has since antiquity been recognized as a potent and important social phenomenon (Höpfl 1995). In the ancient Scottish universities, Scots law, which was derived from Roman law, was taught as ‘rhetoric’ in the sense that it was the reasoned art of dialectical argument, advocacy and persuasion (Simpson Ross 1995). Furthermore, Hegel’s idea of language being the ‘ideal existence of consciousness’ (1932: 224) allied to his further thoughts on dialectics and control (cf. Giddens 1979), it is perhaps plausible to deduce that rhetoric, as a use of language, can be used to attempt to alter another’s consciousness and thus the sense they make of their existence.

Rhetoric has been established as a bona fide organizational phenomenon (e.g. Höpfl 1995; Watson 1995). The language and symbolism used by writers in the field presents the concept in a thoroughly positive and useful light, although a variety of approaches is used by the prominent authors. Pedler et al. (1996) and Marquandt (1996), for instance, propose their prescriptions as the saviours of the Western industrial world; Senge (1990) writes with the sort of ‘common-sense’ anecdotal authority that brought Peters, Waterman, Kanter and Drucker to prominence in the popular sphere; Nonaka (1996) and Nonaka and Takeuchi (1995) contribute a certain exotic mysticism to the literature.

Despite the differences in approaches and in the use of discourse, certain themes can be seen to recur throughout. Indeed, such themes are not evident merely in the learning organization literature but in much of the writing on management from the last two decades, much of which focuses on flexibility, flat organizational structure, teamwork, employee involvement and competitive advantage. One could probably trace this mode of thought back to the early 1960s and particularly the concept of the ‘organic’ form
of organization developed by Burns and Stalker (1961: 123). Much of the management writing of the 1980s and 1990s identifies with the essence of the organic organization rather closely, from its context of turbulent operating conditions to its looseness of structure, flexibility and responsiveness to contingent factors.

The most widely read and highly developed accounts of the learning organization (i.e. Senge 1990; Pedler et al. 1996) appear to have continued on this ‘neo-Burnsian’ train of thought. They have further manipulated the ‘organic’ notions to the extent that certain rhetorical leitmotifs emerge not only from their work but also from that of almost all others in the field of the learning organization and also in many employers’ policy statements. These are:

- **Turbulence and change**: this can be increased competition brought about by ‘globalization’, diversified product ranges, the ever-quicker pace of technological innovation (e.g. Garratt 1987; Handy 1989; Giddens 1990) and, in the case of the public sector, fiscal restraint (Grieves and Mathews 1997).

- **Unitarism**: the turbulence creates a ‘we’re all in the same boat’ frame of mind where the very survival of our world is under threat if we do not all pull together and change (Handy 1989). Shared values are at the core of this (Senge 1990; Nonaka 1996). The concept of being part of a team is also inherent in this construct (Pedler et al. 1996).

- **Empowerment**: a well-worn path in management theory but still flourishing in the learning organization literature (e.g. Argyris and Schon 1978; Handy 1989; Senge 1990; Pedler et al. 1996). Employees should make a contribution to decision making and be able to challenge the status quo in order to ensure continuous dynamism, or ‘double-loop learning’ (Argyris and Schon 1978).

- **Personal development**: employees are encouraged to continually develop, learn and acquire new knowledge as this is seen as a way of being dynamic and coping with change and the turbulent macro-environment (Senge 1990; Garvin 1993; Pedler et al. 1996). It is also envisaged that this will make work more rewarding and stimulating for employees (Handy 1989, 1994; Senge 1990; Pedler et al. 1996).

These have been derived from the two most influential models of the learning organization, that of Pedler et al. (1996) and Senge (1990). Table 1 lists the constituent parts of these models. The turbulence is taken for granted as the affliction for which these prescriptions are the cures. Of the remaining three aspects listed above, unitarism is inherent in characteristics numbers 5, 8, 9 and 10 of the Pedler et al. model and in disciplines numbers 3 and 4 of the Senge model. Empowerment appears to be inherent in items 1, 2, 3, 4, 5, 6 and 7 of Pedler et al. and 1, 4 and 5 of Senge. Finally, personal development features in numbers 1, 5, 6, 8, 10 and 11 of Pedler et al. and 1, 2 and 4 of Senge (cf. Snell and Chak 1998).

Each of these constituent constructs will be considered in turn and their rhetorical attributes examined.

**Turbulence**

Thompson and O’Connell-Davidson (1995) have examined the construct of turbulence quite thoroughly and how it makes a considerable contribution to managerial rhetoric.
Although they do not make any specific reference to the learning organization, it is possible to apply their well-crafted account to the subject of this paper because of the insistence of virtually all the proponents of the learning organization that, because of matters beyond the control of the micro-sphere, change is necessitated and that new forms of employment are the only way of combating this. Streeck makes reference to high degrees of ‘uncertainty deriving from a need for continuous rapid adjustment to a market environment that seems to have become more turbulent than in the past’ (1988: 295).

The impact of turbulence on society or an economy is not a new concept. In 1897, Durkheim had this to say of economic and societal change in the sort of language not dissimilar to the prophets of doom who scare and cause panic among us today:

The scale is upset, but a new scale cannot be immediately improvised. Time is required for the public conscience to reclassify men and things. So long as the social forces thus freed have not regained equilibrium, their respective values are unknown and so all regulation is lacking for a time. The limits are unknown between the possible and impossible, what is just and what is unjust, legitimate claims and hopes and those which are immoderate. Consequently there is no restraint upon aspirations.

(Durkheim 1952: 253)

Although Durkheim, in this instance, was discussing the phenomenon of suicide, his thoughts illustrate that ‘turbulence’, in a societal sense, is not a new concept and that it has been charted that fluctuations in stability can have impacts on individuals. Durkheim wrote here of the scale being ‘upset’, using balance as a metaphor and thus a rhetorical device to persuade. The issue of uncertainty is also addressed, again a common device used by writers today. The reclassification of the ‘public conscience’ would perhaps be a ‘paradigm shift’ in the language of today. More recently, Leavitt wrote these prophetic words with more specific reference to the world of commerce:

the shrinking world, the explosion of knowledge . . . at least one thing seems clear: rigid old authoritarian mechanisms will slowly fall to lower and lower positions for they were designed for an orderly, slow-to-change, almost static world. And organizational ambiguity, uncertainty, irregularity will become the normal state.

(Leavitt 1971: 33)

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**Table 1** Pedler et al.’s (1996) eleven learning company characteristics and Senge’s (1990) five disciplines

<table>
<thead>
<tr>
<th>Eleven learning company characteristics</th>
<th>Five disciplines</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 A learning approach</td>
<td>1 Personal mastery</td>
</tr>
<tr>
<td>2 Participative policy making</td>
<td>2 Mental models</td>
</tr>
<tr>
<td>3 Informing</td>
<td>3 Building shared visions</td>
</tr>
<tr>
<td>4 Formative accounting and control</td>
<td>4 Team learning</td>
</tr>
<tr>
<td>5 Internal exchange</td>
<td>5 Systems thinking</td>
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<tr>
<td>6 Reward flexibility</td>
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<tr>
<td>7 Enabling structures</td>
<td></td>
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<tr>
<td>8 Boundary workers as environmental scanners</td>
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<tr>
<td>9 Inter-company learning</td>
<td></td>
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<tr>
<td>10 Learning climate</td>
<td></td>
</tr>
<tr>
<td>11 Self-development opportunities for all</td>
<td></td>
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</tbody>
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Symon: Rhetoric and the learning organization
Again one can identify the language of uncertainty and the need to change. We also see another rhetorical device in the pejorative references to the old order with terminology with distinctly negative connotations e.g. ‘slow-to-change’. This strengthens the argument for change by highlighting the inadequacies in the status quo (Gee et al. 1996).

Indeed, this apparent sense of impatience and urgency is rather at odds with much of the more enlightened managerial thinking of the past two decades, such as organizational development (OD) (Dunphy and Stace 1988), ‘soft’ HRM (Storey 1987) and, indeed, HRD (Redman and Grieves 1999). These models advocate a more sustained, measured, participative and incremental approach to organizational change rather than radical transformation. The rhetoricians would argue, however, that such an approach would not keep up with the continually quickening pace of change in the turbulent macro-environment. Conversely, it has been suggested that maximum flexibility or ‘slash-and-burn’ change could be extremely damaging to an organization in terms of operational stability and morale of employees (Ramsay 1996).

What all this talk of ‘turbulence’ potentially does is to hand the perfect excuse to decision makers that wish to initiate unpopular change and enable them to wash their hands of any responsibility for any upset caused to the affected parties. They can claim, to paraphrase Giddens (1990), that this ‘runaway world’ is beyond their control and that the change is necessary to adapt to the new forces that are shaping us; consequences of modernity perhaps, or the sort of scenario that has faced societies since the dawn of time merely packaged in persuasive language?

Admittedly, there are convincing accounts of many instances where environmental forces are beyond the control or foresight of managers (Dunphy and Stace 1988; Streeck 1988). In such scenarios it is perhaps understandable that if a concern’s viability is threatened then radical change may be necessary. Under such circumstances, Dunphy and Stace (1988) advocate an integration of incremental (planned) change and radical (contingent) transformation for foreseen controlled and unforeseen uncontrolled circumstances respectively.

Drawing from Durkheim and the other authors cited, it seems that vigorous social and economic activity has for a long time been recognized as operating in unstable conditions. One should perhaps bear in mind that, even well within living memory in the last century, the years leading up to the ‘Age of Unreason’ (Handy 1989) were hardly characterized by utopian stability. Two bloody global wars split by a harrowing depression as well as constant political turmoil, including in Europe and North America, will leap out of the books at future historians. Handy’s gruesome vignette of a frog allowing itself to be boiled to death as a metaphor for the Western world if it does not change (1989) appears to seek to persuade by shocking the reader.

So, if the turbulence has been around for a while, why has it only recently become an issue in management thought? Drawing from the well-crafted critique of the rhetoric of turbulence by Thompson and O’Connell-Davidson (1995) and that of management fads by Ramsay (1996), it seems that there are two principal strands to that question. First, the continual search for professional status by managers has meant that they have continually to re-invent the context of their operations, embarking on machismo-fuelled ‘radical departures’, finding new ways of working and organizing (Peters and Waterman 1982; cf. Deming 1986; Guest 1992; Hammer and Champy 1993; Huczynski 1993a, 1993b; Boje 1994; Marchington 1995; Thompson and
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O'Connell-Davidson 1995; Ramsay 1996; Case 1999). Second, the ‘enterprise culture’ which has come about as a result of structural and political changes has handed the initiative to employers (see also Streeck 1988) and the rhetoric of turbulence is used to legitimate authoritarian action and unpopular ‘change’ (for example redundancies, job intensification, trade union de-recognition (see Kelly 1998)).

The issue of ‘learning’ to cope with ‘turbulence’ as a discourse of ‘meaning’ appears to be part of this, as indicated by du Gay:

in order to compete effectively in the turbulent modern global economic environment, the foremost necessity is to remake meaning for people at and through work. . . . The aim is to produce the sort of meanings that will enable people to make the right and necessary attribution to the success of the organizations for which they work. (Du Gay 1996: 41, emphases added)

Du Gay, a post-modern theorist, does not appear to question the construct of turbulence (or globalization) in the manner of Thompson and O’Connell-Davidson (1995). He does, however, identify how the potential exists for the rhetoric of turbulence to be used to exert greater control through the resultant compliance. Boje (1994) also examines this issue closely, claiming that post-modern discourses on organizational learning have tended to legitimate and rather obscure the more unsavory aspects of global capitalism.

So, what of the expected results of the persuasive and disturbing language of turbulence? If survival is the issue, as Handy (1989) appears to believe, then there is only one thing to do: stop all this adversarialism and pull together to work towards shared vision and common goals!

Unitarism

Unitarism as a concept has been addressed substantially in a critical manner (see Fox (1973) for a definitive account). What is under investigation in this instance, however, is the rhetoric of unity that is specific to the learning organization.

Orthodox industrial relations are not really addressed in the learning organization literature. Pedler et al. do pay lip service to trade unions, explaining how partnership is crucial to the success of a learning company:

There is a great developmental potential in any alliance of adversaries, working from their respective concerns to challenge and transfer existing assumptions and methods of working. The ability to organize for productivity and well-being depends upon our ability to think creatively, and dialogue with those with whom we have differences helps to break up old positions and thinking. Any Learning Company initiative in a unionized company must confront this question of partnership. . . . Rather like human resources departments, trade unions have great strengths in both supporting and blocking. (Pedler et al. 1996: 160)

The sentiments expressed are strikingly similar to those in the Donovan Report of some decades earlier (Royal Commission 1968) that was charged by the then UK Government to undertake a substantial review of industrial relations and recommend changes that would halt Britain’s economic decline, for which poor industrial relations were blamed. Indeed, it could almost be suggested that Pedler et al.’s ‘learning company
The references to dialogue for finding ways of organizing more productively has echoes of the productivity bargaining suggested by Donovan that was subsequently such a disappointment (Metcalf 1989). However, whereas in Donovan’s day the co-operation and agreement of the labour movement was seen as crucial, in the post-Thatcher era writers do not appear to think addressing the issue of labour movement in any great depth is necessary. Interestingly, though, the reference by Pedler et al. (1996) to ‘an alliance of adversaries’ does seem like a stark admission that they are not entirely convinced by the capacity of the ‘learning company’ to generate shared visions. Rather, it seems more akin to the sort of pluralist model advocated by Flanders (1967) in the UK at the time of Donovan or perhaps even to the contemporary European models of ‘social partnership’ (Akers and Payne 1998).

The main thrust of the unitarist rhetoricians’ argument would appear to be twofold. First, their message to the labour force would be the traditional ‘we’re all in the same boat’ and ‘we must pull together to survive this turbulence’ (discussed earlier). Second, they would use the other rhetorical tools such as ‘empowerment’ and ‘personal development’ (see below) to say: ‘why on earth would you not want to learn with us, to embark on self improvement and betterment and be empowered?’

Kelly and Kelly have convincing evidence from both the USA and the UK to suggest that employees are not really as susceptible to managerial (new industrial relations or ‘NIR’ (1991: 25)) initiatives aimed at dispelling ‘them and us’ attitudes as managers may think. It is highly plausible that the empirical and anecdotal findings of learning organization writers such as Marquandt (1996), Pedler et al. (1988, 1991, 1996), Senge (1990) and Garvin (1993) do perceive genuine attitudinal change among the workforces featured in their case studies. However, Kelly and Kelly’s analysis suggests that although ‘there is reasonably good evidence of specific attitude change of an instrumental and interpersonal nature . . . there is little or no evidence to suggest that a variety of NIR practices has altered workers’ largely negative views of management in general’ (1991: 43, original emphases). Kelly and Kelly use NIR as a generic term for a number of HRM-orientated endeavours, many of which are similar to associated components of the learning organization, such as communication programmes, team-working and, indeed, empowerment.

Empowerment

As with the concept of unitarism, there exists a cornucopia of critical writing on empowerment in a workplace context. Empowerment in the context of the learning organization is generally represented as members of an organization – all members in some accounts – having a voice and being involved in decision making in a ‘high-trust’ context (cf. Garratt 1987; Senge 1990; Pedler et al. 1996). Ultimately, although few writers on the learning organization use the term ‘democracy’ directly – the European team of Pedler et al. (1996) being a notable exception – that is exactly the sort of image that they try to construct.

The learning organization is portrayed as a sort of participatory utopia where work is made enjoyable and rewarding through views being considered and the devolution
of decision making to those previously not enfranchised. The employer ideally benefits from the ‘knowledge’ supplied by the participative interface and, perhaps more importantly, from the shifts in the psychological contract whereby enhanced commitment and productivity are expected from the employee due to their sense of being empowered. Ultimately, the intent is derived from John Stuart Mill’s maxim: ‘If a man has nothing to do with his country, he will not care for it’ (Mill 1991: 98) – for ‘country’ read ‘organization’. In this sense, the learning organization can be seen to have parallels with the concept of social capital (Symon 2000) with its components of participation and engagement (Putnam 1995).

Coopey (1996, 1998) demonstrates conceptually, using the analytical frameworks of agency and power, how, unless genuine democratic measures are put in place in an organization, becoming a learning organization will result only in an increase of power and control held by those at the top of the organization. However, in constructing an intriguing econometric model, Acemoglu and Robinson (1999) demonstrate how democracy can actually be used as a means of oppression. The power holders in a period of discontent or turbulence, fearing losing control completely, give up some of that power in the form of democracy to pacify the tides of discontent, while remaining in overall control themselves. This was also a finding of Ramsay who suggested that the workers’ involvement often extended merely to petty affairs such as ‘tea, towels and toilets’ (1977: 482).

Democracy, however, is perhaps not an appropriate paradigm with which to view the learning organization. Industrial democracy proper is based upon class-weighted notions of social justice (Ramsay 1977; Schuller 1985), a prominent example of which is evident in Sweden (Hammarstrom 1993). Empowerment and involvement in the learning organization are geared towards organizational effectiveness rather than social justice and are therefore more akin to HRM-style involvement, which has its roots in Japanese management practices (Burchill 1997). As suggested by Höpfl (1995) and Lee (1999), the acquiescence to this sort of participation, rather than leading to empowerment, leads to ambivalence (Höpfl 1995) and impotence (Lee 1999).

Ultimately, the power holders (i.e. employers) are unlikely to want to give up any genuine power for fear of losing control; indeed, this has been established from empirical findings (Cunningham et al. 1996; Höpfl 1994). This is especially the case in the current political and economic climate and it is reasonable to assume that employers will not allow themselves to be disempowered unless forced to do so. Indeed, in the UK this issue acquires a special relevance with the imminent implementation of the Employment Relations Act 1999 under the terms of which employees have entitlements to representation. This issue will be returned to at the conclusion of this paper.

Personal development

Personal development is potentially an ace up the sleeve of the rhetoricians with regard to the learning organization. Training and the accumulation of skills have for some time been a collective bargaining priority of trade unions (Claydon and Green 1994; Stuart 1996). They are seen as gestures of faith and security from the employer and, if one indulges the logic of the human capital theorists (e.g. Becker 1975), the expectation is that they can result in increased wages. However, it is naive
to assume automatically that personal development in the context of the learning organization necessarily equates to bona fide human capital or ‘know-how’ skills, as will be examined shortly.

The rise of the learning organization (in the UK especially) has coincided with the promotion of its civic counterpart, lifelong learning (Hake 1998), which is incorporated in many of the principles of the learning organization (continual development, adapting to change, etc.). In both the learning organization and lifelong learning, the emphasis is on continual learning: a learning organization ‘facilitates the learning of all its members’ (Pedler et al. 1996: 1). However, ‘learning’ is a rather broad concept and some writers have questioned what the nature of this learning is (McAdam and McCreedy 1999). If the learning is to be rewarding for employees and the employees are truly empowered to learn what they see fit, then it is likely that they would want to learn how to improve their golf swing or beginners’ Portuguese, rather than what would be useful to an employer. Admittedly, many employers in the UK have, since the Industrial Revolution, provided resources for their employees to undertake ‘liberal’ education. However, these programmes perhaps had (and indeed have) a tendency to be welfare orientated rather than designed to confront turbulent operating conditions.

UK government policy on lifelong learning emphasizes vocationalism rather than learning for leisure (DfEE 1998; Jones and Symon 2000) and the rhetoricians of the learning organization appear to be keen to underplay the fact that the learning they desire is for the benefit of the employer. This connects with the assumptions of unitarism and survival in times of ‘turbulence’ discussed above. What is interesting is that the trade union movement in the UK has embraced the principles of ‘lifelong learning’ (TUC 1998), although this appears to be more in a skilling and employability context than out of any desire to be especially flexible for the benefit of industry.

The rhetoricians’ view of ‘learning’ is quite different: essentially it is seen as a means of coping with and indeed inducing change; change that is, of course, necessitated by the ubiquitous turbulence. In this sense a clear incompatibility of discourses can be identified between the employer and those representing the employee and gives weight to the argument that ‘development’ is less about being highly skilled and more about being highly moulded into what the employer wants the employee to be: someone who makes ‘the right and necessary attribution to the success of the organization for which they work’ (Du Gay 1996: 41). Under the terms of a free labour market, if employers provide opportunities to get the general skills to do the job well, the employees can then take them elsewhere, thus not only negating the employer’s investment but also potentially meaning the employer’s subsidizing a competitor’s human capital (Streeck 1989). Rather, employers seek to use training and development (learning) as an organization-specific form of socialization (Hallier and Butts 1999; Galunic and Anderson 2000).

This sort of ‘management development’ has actually been problematized quite extensively, with several writers alluding to Foucault’s (1979) metaphorical use of Bentham’s Panopticon to illustrate how the development process can work as a means of disciplining, socialization and surveillance (e.g. Fox 1989). Even in the case of a large and profitable high-tech manufacturing organization such as Motorola with their ‘Motorola University’, many of the courses offered by the ‘university’ appear to have less to do with building circuit boards than team-building and leadership, for example
The choice of the term ‘university’ is an interesting rhetorical device, universities being associated with virtuous and positive notions of self-improvement, enlightenment and also the halcyon days of youth.

The UK has a well-deserved international reputation for under-investment in training and skills (Adnett 1996; Robinson 1996). However, more and more companies are claiming to be learning organizations (Pedler et al. 1996) and it is government policy to create a ‘learning society’ (DfEE 1998). Although incidences of training have gone up in recent years, it has been established that, although more courses are being offered, the length of these courses is shorter (Hallier and Butts 1999). Again it can be seen how the rhetoric, while engaging at first, can mask quite a different story.

A rhetorical model of the learning organization

In much of the literature, patterns can be discerned where the above four rhetorical components appear to follow a logical flow of causal interaction, as is illustrated in Figure 1. The turbulence in the macro-environment causes changes in operating conditions and thus induces the need for adaptation at the organizational level (Handy 1989; Senge 1990). These new environmental conditions then lead to a new order in employment relations, away from adversarialism between employer and employee to shared visions and partnership at the unitarism stage (Nonaka 1996; Pedler et al. 1996; Senge 1990; Marquandt 1996). This results in greater trust and engagement with the post-Fordist rewards of empowerment and personal development (see esp. Marquandt 1996; Pedler et al. 1996). The empowerment and personal development are complementary (Pedler et al. 1996): the members of the organization are empowered to learn and develop and this in turn should increase feelings of worth, value and extent of engagement in the organization (Marquandt 1996). This in turn feeds back to enhance the sense of unity and aids the change process (Senge 1990).

Persuaders and the persuaded

The rhetoric of the learning organization is aimed at both managers and workers: the managers have to be persuaded by the designers of the construct that it is the answer to their prayers for organizational success. The workers then have to be persuaded to engage with it. However, what the persuaders do have in their favour are compatible rhetorical sounds coming from the directions of Europe (European

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Figure 1 A rhetorical model of the learning organization
Commission 1998), the UK Government (DfEE 1998) and the labour movement (TUC 1998), who all endorse the principle of lifelong learning. Indeed, in a document entitled The Future of Work, the European Commission endorses the learning organization in glowing terms. This merely leaves the employee at the level of the organization to be convinced.

Managerial initiatives such as the learning organization may face challenges in the coming years. The UK Employment Relations Act 1999 contains instruments to enforce the compulsory recognition of collective bodies representing the interests of employees which will potentially be an obstacle for employers in winning the ‘hearts and minds’ (Thompson and Warhurst 1998) of their workforce. Also, some eminent commentators have predicted that a resurgence in the power of the labour movement is imminent (see Kelly 1998). If this is the case, the need to persuade will become even greater and whether the learning organization has the staying power to be part of that discourse offensive remains to be seen.

Final thoughts and conclusion

The arguments presented in this paper have sought to examine the general epistemology of the learning organization and to deconstruct it and analyse the rhetoric of its constituent parts. Despite the concept of the learning organization having been in existence for the last decade, it has not been subjected to the critiques afforded by writers to other very similar managerial initiatives such as HRM, TQM and BPR. The writers on the learning organization present it as a radical departure and a panacea and path to success and their very persuasive tones have captured the imagination of managers in both public and private sectors.

What perhaps the learning organization has more of than its predecessors is almost absolute compatibility with the broader context in terms of the political economy and social trends. Lifelong learning has become ingrained in the discourse of policy makers and opinion leaders: the language of change and the need to adapt to a new order (or disorder) have set a mood whereby acceptance of changes, whether for the better or the worse, is facilitated. The learning organization as a concept has ridden this wave, using the context to further persuade and legitimize (Butler 1998).

In the last two decades many management initiatives have come and gone and their lasting contribution to organizational success is very difficult to gauge objectively (Marchington 1995; Thompson and O’Connell-Davidson 1995; Ramsay 1996). Indeed the whole issue of success is itself quite subjective (Ramsay 1996). Authors have sought to explain the trends in terms of faddishness, the hard sell from consultants and management gurus and (most optimistically) an evolutionary process that results in new improved models with each wave. It cannot be merely co-incidental, however, that these initiatives exploded onto the scene in the USA and UK at a time when structural and political changes swung the balance of power in the favour of the employer, with the labour movement significantly disabled (Streeck 1988). It seems that, having found the workers lost in the woods, employers sensed the opportunity to lure them into their control using a copious supply of persuasive language – language that would hopefully gain not only their compliance but also their commitment.

This paper has sought to demonstrate that rhetorical devices such as metaphor,
exaggeration and justification abound in the literature of the learning organization. Furthermore, they appear to do so in the way employers attempt to put it into practice. The extent to which the workforce buys these verbal carrots and sticks will depend on a number of complex factors, not least whether the employer makes good on its promises of empowerment and personal development to any degree. Theoretical and empirical research has shown that many barriers to this can exist, not least the issues of power, trust and resources at a micro level (Coopey 1996, 1998; Höpfl 1994). As for at a macro level, despite the misfortunes of the labour movement, the capacity for new managerial initiatives to induce any radical changes to the dynamics of the employment relationship has been questioned (Storey and Sisson 1990; Kelly and Kelly 1991; Kelly 1998; Bacon and Blyton 1999).

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References

Peer-Reviewed Articles

Symon: Rhetoric and the learning organization


Symon: Rhetoric and the learning organization


Peer-Reviewed Articles


Paper 4:

Consilio Manuque:
The Learning Organization Paradigm and the Problem of Unity
by Graham Symon

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ABSTRACT

This paper draws on literature in the fields of organizational studies, industrial relations, and industrial sociology to attempt to address ‘new paradigm’ managerial initiatives that espouse sentiments of unitarism in their discourse from a UK perspective. The specific focus of this theoretical investigation is the output of the proponents of the ‘Learning Organization’. It is argued that in such organizations, employers attempt to control and induce behavioural change in employees through the use of reorganization and instrumental discourse. Managerial commentators and theorists have written much about what the implementing agents’ expectations are of the outcomes of such organizational initiatives. Among these expectations is that the new initiative will bring about a radical change in attitudes in the workplace and that unitarism will prevail. However, an as yet underdeveloped area of study is what happens when the subjects (i.e. employees) receive the initiative, the potential for counter-ideology and resistance to the initiative, and the forms resistance may take. It is these latter two issues that this paper concentrates on. Ultimately, the paper seeks to present a conceptual investigation of pluralism within, and the nature and implications of resistance in, the Learning Organization. An allusion to Beaumarchais’ ‘Figaro’ is used to illustrate the arguments.

INTRODUCTION

In Beaumarchais’ play The Barber of Seville (the original form of the now more famous Rossini opera of the same name), the motto of the picaresque hero Figaro is “Consilio Manuque,” literally “by stratagem or manual endeavour.” The cunning Figaro uses his wit and industry to pursue his own schematic agenda whilst giving the impression of loyalty to the Count under whose authoritarian and feudal - but rather pompous and less than competent - governance he is employed. The seemingly archaic Figaro allusion may appear to have little relevance to contemporary organizational theory, but the intended point it is used to make is an appropriate one if considered alongside recent trends in scholarly approaches to the study of work and organizations. The hegemony of management and organizational objectives is assumed to be unchallengable in the face of the rhetoric of turbulence, ‘new paradigms,’ shared visions, and more empowered, satisfying work. Environmental forces have contrived to alter production methods, economic processes, and social attitudes in an equivalent manner to those that moulded modernity at the time Beaumarchais was writing. Revolution and innovation brought about capitalism, mass-pro-
duction, and to a certain degree democracy. The new set of societal relations that resulted, according to some extremely influential scholarly thinking, rendered class conflict inevitable and a principal theatre for this conflict was the workplace (Hobsbawm, 1975; Hyman, 1975; Marx & Engels, 1996). At the dawning of a new century, overt industrial conflict may be less a part of the landscape of the world’s developed economies (Kelly, 1998), but one should not necessarily assume that peace has broken out.

Commentators as diverse in nature as Boje (1994), Clegg (1990), Drucker (1988), Toffler (1980), and Zuboff (1988) *inter alia* have suggested the possibility (although not unanimously the reality) of a ‘paradigm shift’ in the latter quarter of the 20th century that is having dramatic effects on the workplace. On the way out is the industrial era of mass production for the accumulation of surplus capital, and in comes an era of intense competition and complex product diversification where the learning and knowledge of members of organizations are the key to commercial success. The contemporary managerialist critiques of modernist means of production make an intriguing counterbalance to the more radical polemics of Fordism, scientific management, and bureaucracy offered by the likes of Braverman (1974) and Gramsci (1971). However, the phenomenon of employee resistance, recalcitrance, and counter-ideology appear to be absent from much of the new managerial literature (see Coopey, 1996; Thompson & Ackroyd, 1995), but it is unlikely to have disappeared. Rather, two key issues arise: firstly, that so-called ‘post-Fordist’ managerial initiatives are not as potent as their proponents may think at eradicating pluralism from the workplace (Bacon & Blyton, 1999; Kelly & Kelly, 1991; Sisson & Storey, 1990); secondly, that even if a fundamental shift in the employment relationship has, in some cases, resulted from management initiatives, ‘new paradigms’ of work organization may lead to ‘new paradigms’ of worker resistance (e.g. Huzzard, 2000; Knights & McCabe, 2000; May, 1999; Prasad & Prasad, 2000; Thompson & Ackroyd, 1995). In other words, although Figaro was a product of the late pre-modern era, had he been around at any time in the modern era or in the new paradigm that organizations are said to have entered in the recent past, regardless of the regime, it is unlikely that his capacity for insubordination and mischief would be curtailed.

This paper attempts to consider one such emancipatory managerial initiative of the new paradigm – the learning organization – and consider the capacity of it in conceptual and practical terms to dispel pluralism and nullify resistance. It firstly provides a background to the epistemology of recent managerial thought and attempts to offer a critique from a UK perspective, hopefully providing a wider audience with an overview of some of the useful critical British writing that has emerged and how it can be used with that of North America and elsewhere. It then considers the learning organization in a critical light, concentrating on its notions of unitarism and shared values. From this critique, a typology of unitarisms is proposed. Ultimately, this paper attempts to move towards a development of Boje’s (1994) conceptualisation of pre-modern, modern, and post-modern approaches to work and organization from which it is hoped that a useful critique of contemporary discourses of unitarism can be presented. The conclusion is reached that while managerial technology such as the learning organization can be classified as a new paradigm or post-modern approach to work, the expectation that such discourses can negate tensions in work place relations – especially in the context of post-industrial Britain - is a problematic one.

**THE CONTEXT: STRUCTURE, STRATEGY, AND SPIN?**

In the last two decades, structural shifts in the political, economic, social, and technical environments of the UK and the USA, amongst other phenomena, have contributed to the establishment of a perpetual phase of managerial innovation (Godard & Delaney, 2000; Hyman, 1987, 1988; Kelly, 1998; Marchington, 1995; Ramsay, 1998; Thompson & Ackroyd, 1995; Thompson & O’Connell-Davidson, 1995). These managerial innovations have taken many forms: e.g. JIT,
TQM, Quality Circles, 'Excellence,' HRM, BPR, HRD, and the subject of this paper, organizational learning and the learning organization. This has especially been the case where it has been suggested that due to structural and political changes, managers have been able to seize the opportunity to – as they see it – regain control of the shopfloor after years of Government supported trade union domination and restrictive practices (Guest, 1995; Metcalf, 1993). Part of this reassertion of the managerial prerogative has been the attempted implementation of discourse based managerial technology or 'HRMism' as Keenoy (1998, 1999) terms it. It is arguable that these innovations have been spawned to a considerable degree by the 'Japanization' phenomenon, whereby 'the apparently successful techniques employed by Japanese industry have captured the imagination of western managers and scholars and prompted them to attempt to reconsider organization forms (see Clegg, 1990; 176-207).

The innovations named above can differ quite radically in content: compare the 'obliteration' (Hammer & Champy, 1993) of BPR with the more soft-and-humanist approaches of aspects of HRM (Storey, 1987) and HRD (Redman & Grieves, 1999). However, they do have a number of things in common. In the first instance, most of them have been heralded at their inception as 'panaceas' or 'magic wands' (Marchington, 1995) with which the 'turbulence' facing Western enterprise, such as global competition and technological innovation, can be addressed. Secondly, that they represent an alternative to orthodox pluralist industrial relations as a means of addressing the workforce 'problem,' i.e. that the demands of the workforce may be incompatible with the objectives of enterprise, thus apparently presenting a potential threat to 'competitive advantage' and/or efficiency (Guest, 1995; Kochan et al., 1996; Metcalf, 1993).

These new forms of organization are presented as attempts to move away from adversarial collectivist industrial relations to a more unified commitment-based employment relationship (see Kochan et al., 1986). Within this new psychological contract, the intention is that conflict is nullified as shared values and high-trust become regulating factors. It has been suggested that the metaphorical imagery used to describe management employee relations has shifted somewhat from that of "trench warfare" to "a journey together into uncertainty" (Dunn, 1990; Keenoy, 1991). Furthermore, 'team' and 'family' analogies have become prominent in organizational discourse (see Legge, 1999; cf. Ramsay, 1975). With specific reference to organizational learning, the term "communities of practice" has been coined (Brown & Duguid, 1991; Lave & Wenger, 1991), conjuring up imagery of idyllic harmonious interdependence (cf. Symon, 2000).

The Learning Organization is just such an innovation of the post-industrial era (Symon, 2002): one intended to bring about sustained organizational success through discourse based manipulation of the behaviour of the human resource in an apparently dynamic, high trust, and rewarding work environment (see Marquandt, 1996; Pedler et al., 1996; Senge, 1990). It has greatly captured the imagination of managers in the UK in both the private and public sector, where it has been heralded as the panacea for Britain's multi-symptom ailment, including lack of competitiveness, poor industrial relations, and lack of skills (Keep & Rainbird, 2000). Indeed, the vast majority of the literature and managerial eulogising on the learning organization presents an idealistic image of co-operation, harmony, flexibility, and fulfillment. A rather less well-developed area is the concept of resistance in the learning organization (cf. Findlay et al., 2000; Huzzard, 2000), despite the findings of many authors of the school of its genesis concept organizational learning that a major part of the concept is dialectically and democratically based (Argyris & Schon, 1978; Cyert & March, 1963; Levitt & March, 1988). The fact that the learning organization - in both its conceptual writings and the attempts at practical manifestation in the world of work - is underpinned, but assumptions of a shift from pluralistic or adversarial workplace relations to harmony and shared visions is problematic. It is to this issue that this discussion now turns.
THE LEARNING ORGANIZATION: IRRESISTIBLE?

The Learning Organization as a concept has captured the imagination of many scholars, management gurus, and policy makers in the spheres of public and private employment. The rudimentary discourse presented by the proponents of the learning organization is that changes in working practices and organizational structures and processes are necessitated by macro-environmental turbulence in the shape of intensified competition and the rapidity of social and technical change. The very existence of large, stable, bureaucratic organizations will be under threat due to their lack of innovation, flexibility, and dynamism (Drucker, 1993; Handy, 1989; Moss Kanter, 1990).

To summarise, the concept of the learning organization has thus arguably evolved from three principal sources:

1. an atavistic rediscovery of Burns & Stalk-er's (1961) 'organic' organization (as opposed to 'mechanistic') (cf. Morgan, 1986; Peters & Waterman, 1982).

2. a development of 'double-loop' organizational learning (Argyris & Schon, 1978; Bateson, 1973) which involves participative challenging of organizational assumptions, courses of action and objectives, as well as learning from the exchange open dialogue in formal and informal contexts.

3. the post-industrial axiom that an organization's ability to gather, share, and process knowledge will be or is of greater importance to organizational success and prosperity than industrial capacity (Drucker, 1968, 1993; Leavitt, 1972; Zuboff, 1988), a phenomenon from which the more sophisticated technique of 'knowledge management' has been derived (Nonaka & Takeuchi, 1995).

As well as changes to processes and structures, a re-alignment of attitudes and values is professed be necessary on the part of the members of the would-be learning organization (Nonaka, 1996; Senge, 1990). As with other managerial initiatives, the focus of the employment is diverted away from confrontation to unitary notions of shared values and teamwork as the realisation is rammed home that the very survival of life as we know it is threatened by the aforementioned turbulence. Thus, a greater attribution is required on the part of the employee (du Gay, 1996; du Gay & Salaman, 1996; Legge, 1998, 1999; Thomson & O'Connell-Davidson, 1995). The trade-off for this greater attribution is not generally discussed in the literature in terms as vulgar as more cash, but rather in the post-Fordist terms of empowerment, satisfying work and the further reward of opportunities for continuous self-improvement.

With the 'new paradigm' or 'high performance' waves of management thinking that materialized circa 1980 onwards, the managerialists got to work on devising an anti-bureaucratic, flat, lean, responsive, adaptive, flexible organizational model with devolved decision-making and a string sense of shared purpose. The 'loose-tight' of Peters and Waterman's (1982) 'excellence' model was followed by Morgan's (1986) 'brain' metaphor with the term "Learning Organization" being fully inaugurated in the work of Garratt (1987) and Handy (1989). 1990 saw the publication of what has proved to be - in a global sense - the most influential learning organization texts and, indeed, one of the best-selling business texts of recent years, Senge's The Fifth Discipline. In a European context, the concept has perhaps been most influentially articulated in the Learning Company of Pedler et al (1988, 1991, 1996).

Although the texts of Senge (1990) and Pedler et al (1996) both offer prescriptions for the creation of successful learning organizations (or 'companies' in the case of Pedler et al for reasons explained in their book's opening chapter) and focus on similar fundamental principles, they differ slightly in their style and substance. Senge offers an anecdotal but awe-inspiring opus of pseudo-philosophical proportion; indeed, he claims not only to have the key to the transformation of one's working life but also of one's outlook on life in general (hence the relevance of the 'hands, hearts, and minds' critique (du Gay, 1996;
Warhurst & Thompson, 1998]). Pedler and his colleagues offer a more positivist, systematic, and pragmatic account based on their initial work on behalf of the now defunct UK Manpower Services Commission (MSC) in 1988. The Learning Company model, which consists of eleven ‘characteristics’ as opposed to Senge’s five ‘disciplines,’ is constructed from the findings of an investigation of best practice and innovation in UK workplaces, and offers a model of utopian commercial endeavour: successful, dynamic enterprises and satisfied, co-operative employees.

Additionally to the above, and indeed with more focus upon the objectives of this paper, the works of Senge and Pedler et al differ in one fleeting but nonetheless crucial way. Senge falls into the trap in which almost every other management writer of the ‘new paradigm’ school falls: the utter conviction that their model is so appealing to employer and employee alike that old adversarial mindsets will be cast aside and all members in the organization will happily give themselves body and soul to the goal of organizational success (Pruitt, 2000; Thompson & Ackroyd, 1995). Pedler et al manage to cling to the edge of the precipice of sociological credibility with a perceptibly grudging acknowledgement that a residual pluralism may exist in a Learning Company. Here they discuss the role that trade unions might play:

There is a great developmental potential in any alliance of adversaries, working from their respective concerns to challenge and transfer existing assumptions and methods of working. The ability to organize for productivity and well-being depends upon our ability to think creatively, and dialogue with those with whom we have differences helps to break up old positions and thinking. Any Learning Company initiative in a unionized company must confront this question of partnership’s trade unions have great strengths in both supporting and blocking. (1996: 160)

It is thus implied that the creation of the appropriate conditions to become a Learning Company may involve a process of negotiation. Indeed, it has been well established by other authors that trade unions can be instrumental in the implementation of productivity enhancing measures such as communication and training (Claydon & Green, 1994; Stuart, 1996). While Pedler et al deserve credit for their acknowledgement that a pluralism of interests can exist, even after the implementation of the self-proclaimed panacea high-performance organizational paradigms, many managerial writers (presumably on purpose) ignore the concept of resistance and pluralisms. Indeed, an ideology has emerged in the last, 20 years that has appeared to marginalise ‘labour’ as a concept (Hyman, 1987, 1988; Thompson & Ackroyd, 1995).

The marginalisation of labour as a significant actor in industrial thought appears to have come about as a result of economic, demographic, political, and technological shifts (Streeck, 1988; Thompson & Ackroyd, 1995). In addition, or perhaps as a result, managers have realised a new-found confidence to assert their prerogative, fuelled by the writings of gurus, the prescriptions of consultants, and lack of significant opposition from relatively weak trade unions (Godard & Delaney, 2000; Huczynski, 1993a, 1993b; Ramsay, 1996; Thompson & O’Connell-Davison, 1995). Thus, we have arrived at a profoundly unitarian position in management ideology. Unitarism, however, although espoused widely in the rhetoric of gurus and managers, is a complex entity, and those that do espouse shared visions, values, and commitment should perhaps adopt a slightly more critical focus if there musings are to be taken seriously in an intellectual context.

UNITARISM AND MANAGEMENT THOUGHT: THE NEW PARADIGM?

Unitarism as a concept comes in various guises in contemporary (and indeed historical) management literature in general, and in the learning organization literature especially. The learning organization is one such discourse that claims to have the answer to the problem of conflict in the workplace. Depending on the subjective position, sensibilities, and sympathies of the commentator, unitarism can be approached and interpreted in a number of ways. The view of what would now perhaps be termed archaic thinkers such as Andrew Ure, Henry Ford, or F. W. Taylor would conform to McGregor’s (1960) “Theory X,” that
workers are inherently lazy and wayward and have to be disciplined and controlled by whatever means that are at an employer’s disposal. Furthermore, such action by employers would be fully legitimate in the context of the pursuit of surplus capital. Contrast the ‘unenlightened’ position with that of the human relations orientated writers who contend that workers, as human beings, have a complex array of ‘irrational’ and non-remunerative needs that it is in an employer’s interests to address.

Any analysis of the dynamics of the employment relationship is further complicated by the contribution of the political and social theorists, especially those in the Marxian tradition (e.g. Beynon, 1973; Braverman, 1974; Hyman, 1975; Tilley, 1978), who see the employment relationship as a manifestation of the class struggle. It is the Marxian perspective that, arguably, some unitarists claim has either never been valid or, as others may contend, is no longer relevant due to the unifying nature of the discourse (Drucker, 1968; Handy, 1989; Kochar et al., 1986). Thus, employers seek to negate resistance or recalcitrant behaviour in the workplace; be it by brute force, stealth, compromise, or rhetoric, it can be argued that generally a unitarist ideal (although not necessarily realistic expectation) underpins their actions. In the case of the learning organization, which we have suggested is heavily laden with the discourse of unitarism, these tensions are apparently resolved by making work varied and rewarding, improving one’s relations with colleagues and managers through open dialogue and sharing of knowledge. However, in order to clarify further the context, it may be useful to attempt to classify types of unitarism.

From the organizational and management literature of the twentieth century, as well as the work of social theorists from the wider disciplines of sociology, political economy, and philosophy, it is possible to draw up a taxonomy of four broad types of unitarism. As will be seen, each of these types has profoundly different connotations and, therefore, for a guru or employer to speak to unitarism as something universally understood and virtuous is highly problematic. The types in the taxonomy, which will be discussed in turn, are as follows:

1. ‘feudal’ unitarism
2. ‘hard’ unitarism
3. ‘pragmatic’ unitarism
4. ‘humanistic’ unitarism

‘Feudal’ Unitarism

‘Feudal’ unitarism relates to the Western world’s social order of the pre-modern era as defined by Boje (1994). It emerges from a society and economic and social relations that are governed by variables that include custom, culture, and deference and servitude to those born to into a perceived higher social order. As the pre-modern era is generally recognised as preceding, industrialization, standard definitions of the contract of employment do not apply. However, work was done and labour was utilised. This, after all, was the era of Beaumarchais and our hero Figaro. Pre-revolutionary France with its aristocratic arrogance and decadence and millions of suffering peasants. In Weberian terms, the type of authority being exercised in this instance is ‘traditional,’ an unquestioning deference to assumed aristocratic superiority (Weber, 1968).

Superstition and religion are also used as controlling factors. Thomas Carlyle, although active in the era of modernity, was an affirmed feudalist, readily citing the Benedictine adage “Laborare est Orare (work is worship - sic)” (1843; 172). The working man’s mission in life was to work, not complain, and be thankful for that work. However, Boje (1994) does point out that the feudal era was one where craftsmen were more powerful, formed guilds, and had absolute control over their means of production – the ideal of Marx. The craftsmen were ‘empowered’ in this sense. However, since industrialization and mass enfranchisement, feudal unitarism has been largely obsolete in the Western world (Boje, 1994). Ultimately, the profoundly normative assumptions underlying ‘feudal’ unitarism were not enough to sustain the situation in the Western World, and the post-Enlightenment era of mo-
dentity was proceeded with its more rational underpinnings. The discourses of the learning organization would appear to have little in common with feudalism: the learning organization is a place for empowered and knowledgeable participation. Arguably, knowledge was a major commodity denied to the masses in pre-modern era, as they would arguably be easier to govern if kept in ignorance. However, Figaro - although a humble servant - was far from ignorant, using knowledge to great advantage to achieve his ends. It is perhaps no coincidence that the feudal **ancient regime** in France was crumbling at the time Figaro was created.

**'Hard' unitarism**

This is the unitarism of Taylor, where the managerial prerogative is paramount and absolute. This is perhaps similar in nature to Mussolini's concept of **Totalitari**, where the state was everything and anyone outside the state was against the state - for 'state' read organization. However, even the most strict of corporate regimes and rationalist of managerial thinkers cannot reasonably take things to this extreme as Thompson and Ackroyd indicate:

...reasoning of this nature makes even the trivial breaking of attendance rules, the temporary disabling of a machine to get a rest, or cutting corners to make work easier, qualify as acts of sabotage (Thompson & Ackroyd, 1995: 616).

It is perhaps rather obvious to state that this type would be at an extreme pole of a continuum of organizational ideology dynamics, but it is far from irrelevant. As with HRM and 'HRMism' (Keenoy, 1997, 1999), corporate initiatives such as the learning organization are adopted as a means to achieve 'competitive advantage' in market conditions (an ideology to which even the UK public sector lost its immunity during the Thatcher era [Flynn, 1997]). Thus, Adam Smith's 'invisible hand' becomes the dominant force in shaping corporate strategy, and as under the new paradigm human resource initiatives such as HRM and the learning organization are integrated with corporate strategy, this puts the employees in the firing line (Armstrong, 2000; Keenoy, 1999; Legge, 1995).

The 'hard' unitarist situation could only be realised if labour was rendered powerless, i.e., unable to exert any influence whatsoever on the 'bargaining' process. For an intriguing insight into the phenomenon of the market and 'bargaining' power, we can turn to Smith's *Wealth of Nations*:

In the long run the workman may be as necessary to his master as his master is to him, but the necessity is not so immediate (1933: 59)

Therefore, we see the sort of logic that inspired Marx about how the capitalist market creates a distinct hegemony (cf. Braverman, 1974; Hyman, 1975). However, the sort of impotence that could allow 'hard' unitarism of absolute managerial prerogative to exist is perhaps unusual in developed economies in the current economic and political climate. Indeed, Giddens explains that in power relations in social systems, "no matter how imbalanced they may be in terms of power, actors in subordinate positions are never wholly dependant and are often very adept at converting whatever resources they possess into some degree of control over the conditions of reproduction of the system" (1982: 32).

Admittedly, sentiments of absolute power and dehumanised prerogative are generally absent in an explicit form from the learning organization literature. Indeed, the apparently progressive and inclusive rhetoric of the learning organization seeks to distance the concept as much as possible from the unsavoury aspects of hard capitalism (see Pedler *et al.*, 1996; Senge, 1980), although Boje (1994) has exposed these discourses as highly problematic. Furthermore, 'hard' unitarism would logically render resistance of some degree inevitable, as its authoritarian nature would be the impulse for injustice-induced mobilisation (Kelly, 1998).

**'Pragmatic' unitarism**

'Pragmatic' unitarism is perhaps the most semantically problematic of the four in the typology, as it arguably is not unitarism at all, but rather
could be considered as verging on *pluralism*. What is here termed 'pragmatic' unitarism is at the fuzzy point in the continuum where the unitary frame of reference and dualism meet (cf. Fox, 1973). Although almost three decades old, Fox’s (1973) influential treatise on pluralism probably remains the most engaging conceptualisation of the fundamental dynamics of the employer-employee relationship. In his work, further developed in his lengthier volume of 1974, *Beyond Contract*, Fox outlined the complexity of the social and economic factors implicated in the employment relationship, and that the rational view of the legal contract of employment was not sufficient to understand or deal with the problem of worker recalcitrance and, furthermore, the nature of a worker’s approach to his (sic) work.

Fox’s thoughts were born of his work as a member of the Donovan Commission of 1965-1968 (Royal Commission, 1968), which was charged with finding solutions to the UK’s perceived “industrial problem,” i.e., trade-union administered worker unrest resulting in poor productivity. Fox, in recognising the inherent dualism in contemporary industrial society, was no militant Marxist; rather, he, along with fellow Commission members Flanders, McCarthy, and Clegg, was part of a moderate liberal group of Oxford labour economists. Ultimately, rather than either the extreme measures of worker control or the draconian enforcement of the managerial prerogative, a highly regulated system of cooperative collective bargaining where the trade unions could realize that they were stakeholders in the economic well-being of the United Kingdom was proposed (Fox, 1966, 1968; cf. Hutton, 1996). Hence, the *pragmatism*. The recommendations of the Donovan Commission were for numerous reasons never implemented with any degree of conviction.

The market may be a dominant force, but as Adam Smith and numerous others since have suggested, the workers can have the potential - however extensive or limited - to exert influence on the theatre of operations by a variety of means. This influence can be perceived to be merely following the course of rational and arguably legitimate self-interest, albeit often in a collective sense, but can obviously be very damaging to the prosperity of an organization, and thus the welfare of the workers as employees of that organization (Fox, 1968). The issue here is that of trying to align the interests of employer and employee, and the consensus is that the best way in which to do this is open constructive dialogue. This dialogue could be in the form of cooperative collective bargaining (Flanders, 1967; Fox, 1968) and the more recent concept of Social Partnership (Ackers & Payne, 1999; Couper & Stevens, 1998), or in the sense of learning and understanding from interaction developed by many of the writers on organizational learning and the learning organization (e.g. Levitt & March, 1988; Pedler et al, 1996; Senge, 1990).

The issue of ‘alignment’ is an interesting one as that is exactly the terminology that Senge (1990) uses (cf. Huzzard, 2000). Senge suggests that one of the keys to developing a successful learning organization is the alignment of the direction and visions of teams and how this can be achieved through dialogue. However, Senge merely seems to believe that the only reason for the non-alignment of teams could be lack of effective guidance, and that their “mental models” are perhaps undeveloped; it does not seem to occur to him that fundamental ideological divisions may exist (Coopey, 1998). Indeed, Coopey (1996) – using the frameworks of Giddens (1979) - suggests that politicised behaviour is inevitable in organizational settings that are experiencing macro-environmental turbulence, and that this pursuit of diverse and frequently conflicting interests is contrary to the assumed climate of a learning organization. Coopey continues:

Pedler et al. acknowledge plurality but only as regards learning [cf. Argyris & Schön, 1978; Cyert & March, 1963; Levitt & March, 1988]; essential differences are an important element in the framework of a learning organization’s internal market, any conflicts which arise are to be settled via constant dialogue. Collaboration based on trust rather than competition in search of advantage is the essence, enabling conflict to be used constructively... Despite the rhetoric the learning organization seems to be placed within a unitarian framework of relationships, a utopia to be achieved through the pursuit of shared goals in a climate of
So Coopey would appear to be reluctant to abandon the institutional channeling of conflict, and is rather dubious of the 'magic-wand' rhetoric that will miraculously have everyone singing the same song in harmony. It seems that even in the postmodern paradigm, profoundly modernist concepts such as workplace bargaining and pluralist democracy would appear to have their place.

The issue of 'democracy' is one worth considering in the context of 'pragmatic unitarism.' In the context of a democracy, there is provision for a pluralism of legitimate and reasonable interests and ideologies (e.g. Mencken, 1926; Mill, 1991; Pateman, 1970). Indeed, democracy is often used in an industrial context in many developed economies (Schuller, 1985). Pedler et al (1996) actually use the term ‘democracy’ in their work, and the framework discussed by Argyris and Schon (1978) has its roots in notions of quasi-participatory democracy. To paraphrase John Stuart Mill (1991), the logic of the managerial writers who allude to democracy would appear to be that the employees have nothing to do with the organization (i.e. they do not actively engage in the pursuit of the concern’s goals) “they will not care for it;” t is thus intended that commitment and identification are generated by creating a sense of ownership. This sort of participation has, of course, been a significant phenomenon in the 1980s and 1990s, whether in terms of financial participator (e.g. employee share ownership) or involvement in decision-making (e.g. quality circles) (Ackers et al, 1992).

Democracy can be something of a red herring when considering the learning organization, or indeed, organizations in general. One should consider Ramsay's tour de force on "Cycles of Control" (1977), where it was suggested that historically, incidences of industrial democracy and worker participation could be charted with reasonable accuracy against periods of macro-adversity (e.g. recession, war). It was concluded that during these phases, employers wanted to avoid industrial unrest, but at the same time were unable (or unwilling) to concede to worker demands. They therefore appealed the workers with the establishment of various participation programmes to, in Flandres's words, "regain control by sharing it" (1973: 172; cf. Acemoglu & Robinson, 1999). However, Ramsay argued that the control gained by the workers often amounted to little more than concern with trivials such as “tea, towels, and toilets” (1977: 482). The ‘democracy,’ therefore, was merely a means of ‘manufacturing consent’ (Burawoy, 1979).

To summarize the issue of ‘pragmatic’ unitarism, if both employers and employees are to be realistic, it is perhaps the best solution that they could hope for. In terms of the learning organization, it fits neatly beside many of the elements that are espoused in the concept – the dialogue, compromise, understanding and sense of mutual vulnerability. However, as ‘pragmatic’ unitarism is not strictly speaking unitarism in the biblical sense (i.e. while it may entail an alignment of goals, there may still exist a dualism of ideologies), it may require concessions on the part of one or both the actors. Furthermore, as the scientific analysis of Axelrod and Hamilton (1981) shows, of the parties engaging in co-operation, it is likely that one will have to concede more than the other (c.f. Giddens, 1979).

Humanistic Unitarism

The 'humanistic' brand of unitarism list above is perhaps the most problematic from the point of view of the social scientist. Conversely, it is the type on which the gurus eulogize and is most attractive to employers (Ackers, 1994; Ramsay, 1996; Thompson & O'Connell-Davidson, 1995). This is arguably for two reasons: it provides the power and control over the devoted workforce that 'hard' unitarism would provide, while not necessitating, the degree of concession that 'pragmatic' unitarism would require. The best of both worlds would be achieved: absolute control coupled paradoxically with absolute commitment (du Gay & Salaman, 1996; Keenoy, 1999; Legge, 1995). Therefore, in the context of the capitalist society, 'humanistic' unitarism exists in work organization.
whereby subordinates absolutely and willingly defer to the authority of their employer and align their goals with those of the organization. Any prospect of resistance or recalcitrance is thus apparently nullified voluntarily.

Drawing from the literature of many of the general management gurus (e.g. Drucker, 1988; Handy, 1989; Moss Kanter, 1990; Peters & Waterman, 1982), as well as those concerned specifically with the learning organization (Nonaka, 1996; Nonaka & Takeuchi, 1995; Senge, 1990), one can identify strong culture with values controlled by discourse and symbolism as being the dominant themes in the creation of humanistic unitarism. Interestingly, we can perhaps look to Weber for illustration in this instance, as much of the contemporary managerial writers talk of the need to strip out bureaucracy in order to be flexible, innovative and responsive. In Bismarck’s Germany, Weber wrote of the dangers of “uncontrolled bureaucratic domination” (1968: 1435), and went on to discuss the merits of “charismatic leadership” whereby order could be maintained through cultural and value driven mechanisms. Furthermore, charismatic leadership, it is considered, must have a following, and the conditions must exist for that following to want to follow; perhaps a further argument for the insistence upon turbulence as a legitimating factor (Symon, 2002). This point should be qualified by the admission that responses to leadership issues in turbulent conditions are likely to vary between cultures (e.g. Jankowicz, 1999).

Leadership would appear to be an important concept in the attainment of a state of ‘humanistic’ unitarism. Furthermore, from much of the prevalent discourse, it seems that in order to understand this, it may be necessary to depersonalize ‘leadership’, although some writers, most notably Senge (1990) discuss the issue of leadership and its importance in a learning organization at length (see also Eraut, 1995; Marquandt, 1996). However, Senge’s disciplines do not merely constitute a manager’s ‘toolkit’ in the way that Pedler et al’s (1996) 11 characteristics can be seen, but rather a more transcendent testimony almost verging on ‘self-help’; indeed, Senge is apparently greatly influenced by the principles of Zen (Mickelthwait & Wooldridge, 1996). Arguably the guiding light in the case of ‘humanistic’ unitarism is something higher than the mere mortals who manage an organization but, at the risk of being blasphemous, missions that acquire an almost religious stature (Ackers & Preston, 1997; du Gay & Salaman, 1996; Keenoy, 1999; Mickelthwait & Wooldridge, 1996).

Hence, in order to attempt to understand the impulse for the gurus’ and managers’ aspirations towards a hands, hearts, and minds’ spirituality in the employment relationship, it is naturally wise to once more to heed Fox’s (1974) advice and look beyond the legal contract of employment and even notions of work ethic. The concept of the employment relationship evident in the learning organization literature and consider the socially constructed nature of contemporary employment situation. Many aspects of current managerial thinking do not make sense. Of course, the rationalist in us considers that Marx had a point about the apparently irreconcilable nature of the interests of labour and capital, and that there is an abundance of rhetoric-reality dichotomies in management thinking, such as HRM, TQM, and indeed the learning organization. However, as several writers have recently established (e.g. Case, 1999; Keenoy, 1999; Legge, 1995; Watson, 1995), rhetoric-reality is not a straightforward means of approaching such constructs.

Many of the learning organization writers, as well as gurus of other persuasions, aspire to a state of ‘humanistic’ unitarism, which we have considered to be based on charismatic leadership. Yet these very same gurus assert that the learning organization is based on empowerment and decentralization, which suggest a ‘weakening’ of leadership and control. Hence, there are apparent echoes of Peters and Waterman’s (1982) ‘loose-tight’ concept; a seemingly paradoxical and contradictory notion, but nonetheless brimming with influence and self-belief (Guest, 1992; Keenoy, 1999). To return to an earlier theme, this is perhaps the sort of thinking that does not account for resistance as a valid concept. It is a
moot point whether this apparent ignorance of resistance is based upon ‘sweeping it under the carpet,’ a King Knutian defiance of the sea, or Nelson’s blind-eye proclamation, “I see no ships”. Whatever the arguments for ‘humanistic’ unitarism say, the assumptions of many of the gurus - especially Senge (1990) – appear to be on shaky sociological ground (Thompson & Ackroyd, 1995). Interestingly, though, with particular reference to the UK and its current political climate and the resultant rhetoric regarding matters of public policy and administration, contradictions – or more appropriately tensions – such as efficiency, economy, and competitiveness against employee welfare are not seen as unresolvable. The “Third Way” (see Giddens, 1998) – the signature mantra of Prime Minister Tony Blair - espouses a message of combining a competitive and dynamic market economy with a strong, vibrant, and communitarian society; many critics see this as being paradoxical. The learning organization as a concept arguably espouses similar sentiments, and it is the “Third Way” attitude towards policy matters that has perhaps led to the UK Government endorsing the learning organization in glowing terms (Stationery Office, 1999: 56-57).

Mapping Unitarisms

The above typology should not be seen in terms of distinct types, but rather of ‘ideals’ that exist merely in the form of discourse. The dichotomous situation of ‘rational’ and ‘normative’ forms, placed against those forms based on ‘inclusive’ and those on ‘exclusive’, allows the four point typology to be mapped on a continual matrix as illustrated in figure 1.

A relationship between the quintessentially feudal form of unitarism and the discernibly post-modern humanistic unitarism is that they are discourses that seek to appeal to the normative sensibilities of their audience. The hard and pragmatic forms - associated more with modernism – are, on the other hand, pulled more to the rational pole of the continuum; they are more associated with the economic functionality of the capitalist state of modernity (see Marx & Engels, 1996). The second dimension to the matrix is the dichotomy between forms of unitarism discourses based on inclusion and those based on exclusion; i.e., whether or not the discourse permits the participation of subordinates. In this instance, it is the feudal and hard forms that are grouped together at one end, and the pragmatic and humanistic at the other.

![Figure 1 A Taxonomy of Unitarisms](image)

The learning organization construct, although loudly proclaiming its post-modern humanistic credentials, can be seen to have aspects from not only one but three of the areas illustrated. For example, the post-Fordist rhetoric of a rewarding conflict-free working environment draws from the normative-inclusive sector inhabited by humanistic unitarism (Marquandt, 1996; Nonaka, 1996; Senge, 1990). The participative decision-making and dialectical aspects draw from the rational-inclusive pragmatic sector (Findlay et al, 2000; Huzzard, 2000; Pedler et al, 1996). However, most controversially, perhaps the strongest (but nonetheless tacit) voice of all is from the rational-exclusive sector. The learning organization is not merely a gratuitous piece of organizational theory aestheticism, as some would dismiss it; its discourse is there to ultimately ensure the instrumental aim of “competitive advantage” (i.e. increased profits and/or greater efficiency) in the face of seemingly unchallengable economic determinist claims of business management goals; 'hard' capitalism (Hallier & Butts, 1999; Keenoy, 1999; Legge, 1998; Thompson & O'Connell-Davidson, 1995).
Challenges may be what the rhetoricians of the learning organization and unity seek to avoid. However, the discourses, especially those in the humanist camp, are far from watertight. It is this that will now be explored.

**VIVE LA RESISTANCE?**

**The Shift?**

The point of departure for this section of the discussion is the rhetorical notion of the paradigm shifts that necessitates a radical change of attitude in approaches to work and organization. In much of the learning organization discourses and, indeed, that of contemporary management technology and some social commentary, attention is given to the concept of change and the dawning of a new era. It is variously described as post-industrial, post-capitalist (Drucker, 1968, 1988, 1993), the “Age of Unreason” (Handy, 1989), the “Third Wave” (Toffler, 1980), the “Runaway World” (Giddens, 1990) and post-modern (Boje, 1994; Clegg, 1990). In the developed world, developments in technology, political economy, and society are said the have brought about a shift as profound as that from the agrarian society (pre-modern) to the industrialised society (modern) (cf. Boje, 1994).

Discourses of change, uncertainty, and turbulence are evident in the literature on the learning organization, and are clearly identifiable as rhetorical legitimation for (often unpopular) managerial action (Thompson & O’Connell- Davidson, 1995; Webb, 1996). The scenario is painted as “change or survive.” Hence, the discourses of unity are presented, putting old differences aside and working and ‘learning’ together in a high productivity, high trust, high reward partnership. With ‘knowledge’ and the ability to learn becoming the keys to survival and success, the contribution of knowledge to an organization by its members becomes the new work process rather than the traditional rewarding of effort while extracting surplus value. Thus, notions of labour and the labour process are seen to be redundant, and Braverman’s (1974) commentary of employers’ efforts to deskill work is portrayed as being preposterous. Indeed, the learning organization is presented as a form of upskilling; empowering workers, and allowing them to fulfill themselves in the workplace with innovative, satisfying work and personal development.

The praxis of the new workplace and the context of the learning organization appears to present a different scenario. While few commentators will dispute the fact that the final decades of the 20th century are characterised by immense social, economic, and technological change, the paradigm shift thesis should be treated with caution. There can be no doubt that the economic restructuring of the last quarter of the 20th century has had an overwhelming influence on employment matters, handing the initiative to employers in terms of voice, control, power, and the introduction of mechanical and organizational technology (e.g. Godard & Delaney, 2000; Hyman, 1987; Streeck, 1988). In such a situation, employers are ideally better placed to elicit a more bountiful return from labour with the weakening of trade unions, decline in collective bargaining and restrictive practices, and accelerated implementation of new technology. Indeed, economists on both sides of the Atlantic have suggested that better economic performance is the direct result of this assertion of the managerial prerogative and the accompanying sophistication of organizational restructuring (see Kochan et al, 1996; Metcalf, 1993).

The shift from pre-modernism to modernism was defined by - amongst other factors - the shift from a feudal society based on hierarchical obligation to one in which a wealthy elite, where the capitalist utilised mass labour to turn raw materials into a product to sell at a profit to accumulate capital (Marx & Engels, 1996). However, to suggest that in this post-modern era that a fundamental shift in the focus of the political economy has occurred should be qualified by the observation that most work continues to happen in a context of the selling of labour to employers whose aim is to make a profit, or at least achieve the organization’s goals a inexpensively as possible.
The Intelligent Worker and Unity

One of the principal assumptions of the postmodern shift to unity is that with the decline of manufacturing and Fordism, workers will not be so alienated. The new economy based on knowledge, apparently, one that will not merely serve the privileged elite, as was the case with premodernity and modernity. Rather, all workers (who are in a position to make the appropriate attribution) can share in the newfound intelligent prosperity of organizations and society.

Knowledge, as Francis Bacon and more recently Michel Foucault (1980) have observed, is power. If power is supposedly not an issue in the unified learning organization (cf. Coop ey, 1996), the role of knowledge in such an organization is problematic. Foucault (1979) attempted to demonstrate that governance was achieved by knowledge, knowledge that came from subjugation and surveillance. Coop ey (1996) argues that despite the humanistic rhetoric of the learning organization, processes of governance still occur as control must be exercised to utilize an organization’s resources – human and otherwise – in the quest for competitive advantage. Therefore – cont roversially – it can be suggested that the important aspect of the learning organization that espouses the virtues of knowledge sharing and transparency can be anything but emancipatory. Empirical research (Lahteenmaki et al., 1999) has shown that in workplace situations where knowledge is a prime commodity, it is jealously guarded rather than openly shared. Furthermore, if knowledge is valuable, the workers who hold the valuable transferable knowledge will feasibly use it for the advancement of their own self-interests, taking it to the highest bidder. Neither of these scenarios can be described as unitarism, but rather a display of rational self-interest. In fact, in a UK context, the pursuit of rational self-interest has been suggested as a more potent motivation than any sense of loyalty, solidarity, or shared values with either employer or labour movement (Fox, 1985). Furthermore, whilst on the subject of the labour movement, it should be noted that it has been established that if the learning organization can be used as a weapon to combat adverse business operating conditions, it is, therefore, a weapon that can be used against the employer. Huzzard’s (2000) analysis of organizational learning among workers at Swedish electronics plants shows that organizational learning, rather than serving the employers ends in socializing the workforce and creating unity of purpose and values, consolidated the trade unions in resistance to the management.

The emphasis on normative aspects of behaviour that is espoused in the learning organization literature uncovers a scenario where the potential exists for all the world to become a stage. A study by Turnbull (1999) highlights the complex nature of ‘emotional labour,’ where workers can find themselves ‘play-acting’ and hiding – or more worryingly suppressing and denying – their true feelings in the face of organizational authority (Turnbull, 1999: 128). The outcomes of such a scenario are either, as Turnbull (1999) found, increased stress and anxiety from the denial of the ‘true self’, or conversely a clever deception of authority by the worker for their own ends (e.g. promotion) in the manner of Figaro at the court of his master - the Count - as depicted by Beaumarchais. Furthermore, as suggested earlier, Figaro was intelligent and thrived on knowledge, but the knowledge was put to uses that did not benefit his employer.

Plus ça change...

As noted by Kelly (1998), post-modern and paradigm shift theses are problematic. The assumption that industrial conflict will be negated by changes in production methods and/or new forms of organization is a flawed one. It is questionable that the discourses of changing work practices reflect the experiences of those at work. The learning organization’s ideals of empowerment, participation, sharing, and development are not generally evident in praxis. The preoccupation with discourses perhaps deviates from the road to more practical solutions to any problems facing UK industry. It is unlikely that poor industrial relations (Kelly, 1998) and an inadequately skilled workforce (Hallier & Butts, 1999; Keep & Rainbird, 2000) will be remedied by rhetoric alone. The in-
dustrial relations issue is one which policy makers, particularly notably around the time of Dono-
van (Royal Commission, 1968), have been try-
ing to remedy since the advent of organized la-
bour. New European directed legislation and a
more progressive approach towards trade union-
ism may make a contribution in that direction. As
for the skills issue, as Keep and Rainbird point
out in the wake of their critique of the unitarist
assumptions of the learning organization:

While interesting as a theoretical construct . . . the idea of the
[learning organization] may be of limited value in serving as a
blueprint for skills policies in the majority of UK organizations
(Keep & Rainbird, 2000:190)

There is, therefore, a body of compelling opinion
that suggests that the proponents of the new
paradigm learning organization have perhaps dis-
carded modernist rationality rather prematurely.
The need for proper 'know-how' technical skills
(Hallier & Butts, 1999) and a more participative
and consensual approach to the management of
people (Coopey, 1996; cf. Jankowicz, 2000) still
appear to have their place.

CONCLUDING THOUGHTS

The dawning of a new era and the resultant need
to change has been a central theme to much, if
not most, mainstream managerial theory. The
negating of conflict, and indeed the incorporation
of those members of organization that are pre-
pared to 'play ball' and make the necessary atri-
bution, is the promised result of 'change' which
should not be resisted. The learning organiza-
tion's discourses of unitarism are the quintes-
sence of 'new paradigm' management theory. The
unitarism inherent in new paradigm management
theory discourses is of a profoundly normative and
'humanistic' nature -- it preaches inclusion.
This is contrasted to other perspectives on
unitarism that are 'exclusive' or rational.

However, analysis of the discourses of
learning organizations and new paradigms, and
review of empirical studies of the impact of initia-
tives in practice, cast doubt on the extent to which
any alignment of interests can be achieved. This,
it has been suggested, is because although al-
ternative discourses to modernism, Fordism, and
pluralist industrial relations have been presented,
as long as the paradigm of capitalist production
and accumulation of surplus capital remains in-
tact (a quintessentially modernist activity; see
Boje, 1994; cf. Marx & Engels, 1996; Smith, 1933),
dualisms will remain intact.

Furthermore, this paper has sought to
demonstrate that the concept of 'unitarism' itself
is by no means straightforward. Four contrasting
discourses of unitarism are proposed above,
which can be mapped roughly against what are
generally recognised to be the stages of the three
principal eras: pre-modernity, modernity and post-
modernity. It is apparent from the model of
unitarisms that these discourses have evolved from
the normative of the pre-modern to the rationality
of modernity and then to the normative of the hu-
manistic unitarism, where it is suggested that the
proponents of the learning organization claim that
their construct is situated. This atavism of the
normative is an intriguing one; how the manipu-
lation of symbolism and social construction has
returned as the regulating factors of organizational
life, supposedly replacing the obsolete conflict of
rational interests associated with modernity.

An alternative way of looking at this new
paradigm is in terms of the post-war quest by the
management function to be regarded as a cred-
ible profession, plus the susceptibility of manag-
ers to trendy organizational techniques - es-
pecially those that appeal to their vanity (Case, 1999;
These have rather obscured the more tangible
aspects of the course and evolution of industrial
sociology (Hyman, 1987; Thompson & Ackroyd,
1995). To suggest that managerial discourse and
new ways of organizing, such as the learning or-
ganization, can provide the impulse for a radical
altering of behaviours and attitudes toward work
is perhaps misguided. It has rather been potently
suggested that workers are more inclined to make
their own sense of their experiences of work (e.g.
Goldthorpe et al., 1968) and furthermore, have a
virtually insatiable appetite for deviant behaviour
regardless of the circumstances (Thompson &
Ackroyd, 1995). However, where these manifestly impotent innovations do gain importance is that they help build social constructions that are perhaps unwise to dismiss purely in terms of "rhetoric and reality" (Keenoy, 1999). In essence, there are a number of discourses about post-modernity, new paradigms, and the 'end of history'. Many are optimistic about the prospects for a new, rewarding, conflict-free workplace (see ibid.). Others are blatantly pessimistic about the prospects for workers in this brave new world. It appears that the challenge that faces organizational researchers is to establish the nature of the synthesis of a 'dialectic' between post-modern shared visions, modern reason, and consensus and, perhaps after all this time, still the most compelling of all, the mischief of Figaro.

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Paper 5:

10
Lifelong Learning and Workplace Relations: Singing from the Same Hymn Sheet, Worshipping Different Gods?

Graham Symon

Introduction

The concept of lifelong learning is embedded in the zeitgeist. Official bodies, private and public sector employers, and the trade union movement have all positively associated themselves with it; but their common language has not been matched by any shared set of meanings. Both the available literature and evidence of practice show how different the approaches that these groups have adopted are. This chapter attempts to conceptualise these differences by comparing the lifelong learning agendas of two groups: employers and the trade union movement.

One of the key influences on employers’ approaches to lifelong learning has been the idea of the ‘learning organisation’ (Senge 1990; Marquart 1996; Pedler et al. 1996). Becoming one is seen as a key to combating and thriving in uncertain and adverse operating conditions. Lifelong learning becomes personal development and a component of organisational learning and development: the continual redefinition of assumptions and objectives (Argyris and Schon 1978). The anticipated result is a lean, dynamic, flexible and responsive organisation that engages its employees in high-trust, high-commitment relations with challenging and rewarding work. Yet, despite this emancipatory rhetoric, in practice, in the hands of the employers, lifelong learning becomes a means of behavioural adjustment through rhetoric and symbolism (Willmott 1993).

The trade union movement has a quite different conceptualisation of lifelong learning. The UK Trades Unions Congress (TUC) has sought to use it as a vehicle for campaigning for the ‘upskilling’ of its members to improve their employability and earning potential (TUC 1998; Unions 21 2000), while individual unions such as UNISON and AMICUS have supported lifelong learning through local bargaining. This focus on skills echoes the search for
competitiveness via high skills (see Grugulis 2003). Yet, despite the evidence that campaigns to increase training benefit employers and result in harmonious industrial relations, most employers still seem to prefer lifelong learning as an attempt to manage meaning rather than a reason to upskill. ‘High’ skills training in the UK is still much lower than in comparable European economies (Robinson 1996; Keep and Rainbird 2000) raising questions about the extent to which the UK can become a high skill, high wage economy. Much of the workplace training provided by employers is actually organisation-specific socialisation (Hallier and Butts 1999; Keep and Rainbird 2000) and the state’s activities in vocational education and training (VET) have been called into question for its ineffectiveness (Grugulis 2003). The deregulated skilling infrastructure in the UK – a result of the neo-liberal policies of the post-1979 Administrations – has resulted in progressive skill development being retrenched and there seems little ambition to develop the UK into a high skill economy in anything other than rhetorical terms. Rather, employers and the state are content to utilise a deskilled and disenfranchised labour force (Lloyd and Payne 2002).

The tensions within lifelong learning are most apparent where trade unions seek more ‘useful’ training in terms of transferable skills that will increase employees’ security, employability and control over work (Claydon and Green 1994). Employers’ notions of lifelong learning are intended to gain greater control and induce attitudinal change to encourage the fulfilment of employers’ objectives on employers’ terms (Hallier and Butts 1999; Keep and Rainbird 2000). While managerialist interpretations of lifelong learning are presented in terms of ‘high performance’, ‘new paradigm’, ‘partnership and unitarism’, this rhetoric is often little more than another means to humanise capitalism or to obscure its more unsavoury aspects (Ramsay 1977; Cressey and MacInnes 1980; Willmott 1993). Essentially, employers’ approaches to lifelong learning deskill and disenfranchise by gaining control from employees (see Braverman 1974; Willmott 1993). This chapter seeks to assess the nature and consequences of these tensions and considers whether an understanding of the issues of differing approaches to lifelong learning can make a contribution to our understanding of relations in the contemporary workplace. It concludes that lifelong learning is part of the ‘contested terrain’ of UK production.

**Lifelong Learning and the UK**

Lifelong learning has become virtually unavoidable in contemporary UK society. For some the focus is adult and/or community education, quality of life, leisure or self-improvement (Jones and Symon 2001). For others it is a form of civic engagement and a vital component of participatory democracy (Schuller 2000). However, arguably the most vocal institutions are those that assign economic and vocational functions to lifelong learning (O’Connell 1998).
This distinctly economic flavour has led to accusations that policy-makers have hijacked the concept of continuing and adult education (Jones and Symon 2001). A coherent vision of the potential economic and social uses of lifelong learning was provided by Faure and his colleagues (1972). In this work, a blueprint for a general developmental framework of continuing education intended to enable democratic engagement, and individual and societal growth, was proposed and endorsed by the UN. In countries as diverse as Japan, Australia, France, Singapore and South Africa, coherent and successful frameworks of adult and continuing education have yielded simultaneous economic and social benefits (Holford et al. 1998). Yet, almost three decades after Faure, the social agenda of lifelong learning has been marginalised in many nations – not least in the UK – with vocational and economic priorities dominating the agenda.

Lifelong learning has underpinned much of the previous two UK Governments’ policy on skill formation and labour markets (DfEE 1995, 1998). A voluntarist framework is considered by policy-makers – however misguidedly – to be the means whereby the UK can have the skills to be a flexible and dynamic economy. Within lifelong learning, workers should have the means to update or change their skills. In this neo-liberal scenario, individual actors and institutions have agency to pursue their own fortunes. The impulse for social action, justice and progress stems from market mechanisms. Neo-liberalism as an ideology has been found wanting by numerous critics (see Streeck 1989) not least because opportunities in society are rarely ‘equal’ and markets – despite deregulation – generally not ‘free’ (Warhurst 1997).

The principal aim of the current government’s lifelong learning policy is to create a ‘learning society’ (DfEE 1998) that is more than a system of adult education. Rather it has become an instruction to participants in the labour market that they must adopt whatever behaviours and values that employers desire. The ‘learning’ in lifelong learning is not education but attitudes and characteristics. The pay-off for individuals is that work will be varied, exciting and rewarding in a manner consistent with post-Fordism. It is possible to detect echoes of Charles Handy’s utopian vision of the ‘portfolio’ career (Handy 1989). Workers can enjoy the emancipation of occupational fulfilment unconstrained by the iron cage of bureaucratic industrial organisation. This similarity extends to the fact that responsibility for skills rests with individuals.

The Government commissioned three committees – chaired by Dearing for higher education, Kennedy for further education and Fryer for lifelong learning in general – to investigate ways in which the learning society might be realised (Tight 1998). There were four principal developments that resulted from these deliberations. Firstly, there was an expressed intention to consolidate the largely ineffectual system of National Vocational Qualifications (NVQs), a strategy that is yet to yield convincing improvements (Grugulis 2003). Secondly came the foundation of the controversially named ‘University for
Industry' (now referred to as LearnDirect) and the disastrous introduction of Individual Learning Accounts (ILAs); initiatives which received the backing of much of the trade union movement (e.g. UNISON 1999; MSF 2000). Finally, at the level of individual workplaces Investors in People (IiP) provided a seal of approval to employers judged to be implementing effective employee development practices. Accounts of its efficacy are mixed (Grugulis 2003).

For all the apparent activity surrounding 'economic' lifelong learning and the reiteration of the importance of being skilled, there have been no moves to a compulsory levied system of VET. Despite the fact that the skill levels in certain areas of the UK economy are perilously low, VET policy continues to be voluntarist with the market expected to regulate skill levels (Streeck 1989; Keep and Rainbird 2000).

Lifelong learning is dominated by economic imperatives. The government pays lip-service to the non-economic aspects but does not engage in any constructive actions to achieve them (Jones and Symon 2001). As Tight explains, policy manifestos tend to assert 'without evidence, in a taken-for-granted fashion – the critical importance of lifelong learning for the economy. They then quickly qualify this by referring to other, non-economic, personal or social (even...spiritual) benefits' (Tight 1998: 482–483). In practice, these non-economic benefits are marginalised or subsumed. In The Learning Age (DfEE 1998) the economic and the social are conflated with solutions to 'social exclusion' anticipated from economic interventions (Edwards et al. 2001).

**Employers and Lifelong Learning**

As employers and employers’ interest groups have been granted a considerable input into the policy-making process, it is not surprising that they endorse the concept of lifelong learning (e.g. CBI 1998). Employers readily express concerns about the lack of skills in the labour market and often blame the systems of compulsory and post-compulsory education (Robinson 1996; Hallel and Butts 1999). Lifelong learning has underpinned a considerable amount of managerial thought, emphasising the need for adaptation and innovation in the face of environmental change, and intensified competition brought about by compelling phenomena such as 'globalisation' and the coming of the 'information society'.

The epistemology of the learning organisation can be traced back to the work of organisational theorists (Cyert and March 1963; Argyris and Schon 1978) who developed the notion of organisations as learning systems and attempted to refine the rather ethereal concepts of organisational and 'double-loop' learning. These involve the development of organisational cultures through collective interaction, sharing knowledge and challenging the status quo, allowing organisations to be creative in the face of adversity. These notions echo the classic model of the 'organic' (as opposed to 'mechanistic') organisation
where looser, less hierarchical more democratic structures can facilitate innovation, especially in the face of uncertainty and macro-environmental turbulence (Burns and Stalker 1961).

This flexibility and dynamism is attractive to employers, many of whom have an insatiable appetite for the managerial techniques provided by consultants and gurus (Ramsay 1996). The ethos of contemporary discourses of lifelong learning have been encapsulated in the concept of the ‘learning organisation’ (Senge 1990) or ‘learning company’ (Pedler et al. 1996). The learning organisation largely embodies the spirit of lifelong learning in the sense of continuous development, adaptation and improvement. However, due to the charisma-hungry nature of the audience, the concept also embodies normative and sociologically problematic notions of trust, empowerment, unitarism and organisational effectiveness (Symon 2002).

Of course, one should not confuse or conflate the idealistic musings of managerial writers or the unrealistic aspirations of some managers with actual material developments in the workplace (Keep and Rainbird 2000). However, at the rhetorical level at least, the idea of the learning organisation is both powerful and popular. Barley and Kunda (1992) and Ramsay (1996) have offered eloquent accounts of the ways in which initiatives reflect the mood and mores of the times; ‘downsizing’ and ‘hard’ HRM in recession (Keenoy 1999) or participation and involvement when employers want consent (Ramsay 1977). Management also responds well to organisational heroism and gurus stoke their delusions with sycophantic eulogies on, for instance, the potential for inspirational leadership. However, as Carlyle argued, in order to be a hero one must counter a villain (Carlyle 1872). So corporate villains are created: the UK’s poor economic performance in the 1970s and early 1980s was blamed on labour’s militancy (Cutler 1992). By the mid-1980s skills shortages became the new villain, which later transformed into the unwillingness of organisations (or indeed society) to learn (Keep and Rainbird 2000).

As with a great deal of managerial literature, much of the writing on learning organisations is a combination of prescription and panacea supported by accounts of utopian workplaces where workers are engaged in a harmonious, rewarding and productive ‘love-in’ with management. Jargon and hyperbola abound and little stands up to critical scrutiny (Keep and Rainbird 2000). This is especially the case with The Fifth Discipline (Senge 1990) that has pretensions of being a work of philosophy and repeatedly states that the book should not merely be regarded as a business book but the blueprint for a new way of life.

Despite its shortcomings, the idea of the learning organisation has undoubtedly captured the imagination of managers. Statements such as ‘we are a learning organisation’ can be seen on a variety of company reports, public relations materials and policy documents while the White Paper, Modernising Government (Cabinet Office 1999) instructs public sector bodies to become learning organisations. There is no officially sanctioned benchmark, so
employers are free to use the label whether or not they fulfil the criteria. Many claims are questionable, particularly in the public sector where recent experiences have been anything but harmonious and enriching. Ironically, much of the excellent training that does occur in the public sector, legacies of its role as a ‘good employer’ or the product of professional codes and qualifications, can lead to skilled workers obstructing ‘learning’ that is simply accepting managerial instructions (du Gay 1996).

More doubts are observed in the private sector with empirical studies questioning the learning organisation’s viability (e.g. Lahteenmaki et al. 1997 with the UK and Finland; Huzzard 2000 with Sweden). In response, the gurus turn to their favourite tool, the anecdote:

Rover has grown and benefited immensely over the past five years as an emerging learning organization. There has been a continuous flow of improvements initiated and generated through learning by empowered employees. Learning has indeed resulted in a better bottom line, happier employees, and a superior global wide (sic) reputation. (Marquardt 1996: 208)

Marquardt (1996: 194) attributes an atypical profit made in 1994 to the company's 'journey to becoming a learning organisation'. He provides little evidence, but the language used speaks volumes about the nature of the learning organisation: it is a normative instrument of rhetoric and symbolism rather than an actual tangible process. Worriedly, Marquardt’s account does not consider factors such as the state of the automotive market, levels of investment, public subsidy or trading of assets. In fact, when BMW acquired Rover in 1994, the firm's future was in some doubt and substantial investments in plant, R&D and skills were needed (Brady and Lorenz 2001). In 2000, Rover, nicknamed 'the English patient' by the German press, was sold. It may be that (in contrast to Marquardt’s account) BMW's failure to turn the Longbridge plant into a little slice of Bavaria can be attributed to the lack of cultural and institutional infrastructure necessary to develop and sustain a high-performance work system (Lloyd and Payne 2002).

The normative tone of employers' lifelong learning and learning organisation discourses is noteworthy. The skills that are expected to result from employers' lifelong learning initiatives are often not high or transferable, but more abstract competencies such as being a 'team player' or 'coping with change'. This is even the case with the hi-tech manufacturer Motorola’s 'University' (Hallier and Butts 1999). Indeed, empirical investigation has suggested that many UK employers place attitudinal attributes above technical capacity and qualifications in recruitment (Robinson 1996). Malleable attitudes will 'enable people to make the right and necessary attribution to the success of the organisations for which they work' (du Gay 1996: 41; Warhurst and Thompson 1998). Many of the skills employers demand are attitudinal characteristics such as 'punctuality' and 'following instructions' (see Robinson 1996; Keep and Rainbird 2000).
Given the voluntarist system, employers may have acted rationally by using resources that could have been spent on vocational training as surplus revenue. Many have chosen to compete on the basis of cost, used operations as ‘cash-cows’ (Cutler 1992) or engaged in mergers and acquisitions (Keep and Rainbird 2000). The rhetoric on competitive advantage through skills seems misplaced.

Trade Unions and Lifelong Learning

Trade union involvement with education is long-standing. The Workers’ Educational Association (WEA) is a well-established source of adult education and most unions are providers of significant amounts of training (Payne 2001). Unions have also cooperated with industry and the state to coordinate apprenticeship training, a practice presently moribund in the UK (Keep and Rainbird 2000). More recently, they have developed their own lifelong learning policies, promoted skills through bargaining, distributed the state supported Union Learning Fund (ULF), deployed ‘skills reps’ in workplaces and engaged in ‘partnerships’ with employers.

Managerialists are critical of the trade union movement, accusing them of hindering enterprise (see Ackers et al. 1996). However, there is an increasing body of evidence that suggests the presence of a trade union can make a significant contribution to productivity by encouraging training. The trade union movement has also made significant contributions to lifelong learning internationally (ILO 2000), at national congress (e.g. TUC 1998; Unions 21 2000), and locally (Munro and Rainbird 2000; Payne 2001). Furthermore, unions have collaborated with employers, the state and other interest groups in a number of fora such as the Campaign for Learning, in the administration of the ULF and through submissions to commissions of inquiry.

Trade union concerns over the availability of education and training can be traced to its roots as a social and political movement (Flanders 1968). Given their substantial decline in membership and influence, current hopes for renewal are pragmatic and require unions to increase their appeal to employers, society in general and especially workers (Ackers et al. 1996; Kelly 1996). Though there is still space for rhetoric:

The notion that learning is a peripheral union issue is gradually collapsing. Anyone questioning the merit of placing skills on the bargaining agenda need only look at some of the ideals behind lifelong learning that have always been at the heart of trade unionism: empowerment, respect, fulfilment at work and the quality of members’ lives. (Unions 21 2000: 2)

Payne’s consideration of strategies on lifelong learning discusses the way that unions can help their members cope with changing economic and social circumstances (see Payne 2001: 381–382). According to social theory, those
who prosper during times of upheaval will be the ones with access to cultural and educational resources (Beck 1986). Payne argues that many union members lack these resources and trade unions can be useful as agents of lifelong learning. This consensus over the value of lifelong learning has advantages, but also poses problems. Despite the similarities in the rhetoric, trade unions seek different objectives from lifelong learning and these require very different approaches.

UNISON is the UK’s biggest union and, as well as contributing to national policy, administers many of its own members’ education and training programmes (Munro and Rainbird 2000). The white-collar union (Manufacturing, Science and Finance Union, MSF) (now part of AMICUS) has been similarly proactive (MSF 2000). Interestingly, the government has endorsed these policy initiatives by awarding funding to the TUC (Antill et al. 2001). Munro and Rainbird (2000) have identified this as ‘managerial-servicing’ unionism (cf. Heery 1996) that entails pragmatic servicing of members’ needs. UNISON aims to install ‘learning reps’ in every workplace in order to coordinate lifelong learning and lobby management (UNISON 1999; cf. Antill et al. 2001). As of July 2001, there were 3240 ULF funded learning reps in UK workplaces (Antill et al. 2001), although unions have considerable difficulty in recruiting and retaining reps; perhaps because the impetus for collective action has subsided (Heery and Kelly 1994) or because reps have difficulty being taken seriously. Section 5 of the Employment Relations Act 1999 makes (very limited) provision for bargaining on training matters, but as with so much in that piece of legislation, expectations have not been met (Ewing 2001). One example of successful practice is Ford, UK (Payne 2001); through the Employee Development and Assistance Programme (EDAP) scheme, access to learning and development on the shopfloor has been enhanced due to the Transport and General Workers’ Union (TGWU) reps. It is doubtful, however, whether learning reps would carry out their union duties with the same charismatic fervour as the militant shop stewards portrayed by Beynon (1975) three decades ago carried out theirs.

It is not only union members who benefit from VET. Through the assertion of training, unions have directly contributed to increased skill levels and better organisational performance (e.g. Claydon and Green 1994; Heyes and Stuart 1994; Dundon and Eva 1998). It should be noted, however, that the presence of a trade union can also depress investment in human capital by raising wages and countering productivity gains (Metcalf et al. 1996). Nevertheless, these studies underline the point that skilling, skills and learning in the workplace cannot be extracted from the milieu of workplace relations or the wider political economy (Lloyd and Payne 2002).

Union rhetoric and practice on lifelong learning stress the employability and earning potential of members. These are long-standing concerns and the strategies employed to deal with them have changed over time, the means of production may have changed (see Warhurst 1997), but problems with them
are likely to continue, despite new management practices and the rhetoric of post-Fordism (cf. Ramsay 1977, 1996; Ackers et al. 1996; Kelly 1996).

The focus on earning potential is interesting because, expressed through lifelong learning, it is startlingly similar to human capital theory (HCT) (Becker 1975). This is effective only if there is demand from employers for the skills provided or enhanced. Lloyd and Payne (2002) deftly expose the limitations of HCT by explaining the link between investment in skills (which are principally individual) and economic performance. When competitiveness is based on cost (e.g. entering low-quality product markets) rather than quality, increasing skills can be futile.

All principal institutions in contemporary industrial relations agree that the UK should become a ‘competitive’ economy and that the competitiveness should be based on high skills. However, the fact that in many organisations unions have to campaign for training is an indictment of British employers (Claydon and Green 1994). It is also worrying that union calls for high skills are resisted even when it has been convincingly demonstrated that investment can improve quality, productivity and performance. Employers seem to be reluctant to give workers the power that skills would bestow. Rather, employers seek more ‘normative’ attitudinal attributes (Hallier and Butts 1999; Lloyd and Payne 2002). That the UK economy can survive and compete – albeit in the short term – on the basis of such practices perhaps further exposes the limitations of HCT.

At a superficial level, employers and unions do appear to be ‘singing from the same hymn sheet’: competitiveness is important; lifelong learning is important; skills are important; and adaptability to change is important. Indeed much of the bargaining over lifelong learning can be presented as ‘mutual gains’ and ‘social partnership’ (Kelly 1996):

The [TUC’s ‘Learning Services’] has addressed the TUC’s priorities of competitiveness, employability, partnership and new unionism. (ADAPT 2000: 1)

Learning is an issue on which unions can work in partnership with the Government and employers to secure the best deal for their members. (Unions 21 2000: 3)

Rhetorically, at least, the new modernised trade union movement has developed a ‘stakeholding’ outlook. This approach has been effective elsewhere. Streeck (1989, 1992) shows how, in high-tech/high skill workplaces, labour unions have been able to secure influence and legitimacy through the promotion of lifelong learning:

Unions should embrace skill formation as the centrepiece of a new, co-operative and productive strategy, and at the same time insist on the unions’ need for a strong independent power base giving them, just as in the past, a capacity to impose rules and obligations on employers. (Streeck 1992: 252)
The prospects that Streeck discusses are pan-European and seem more achievable from a Continental vantage point where constructive management-union relations are supported by fiscal frameworks and general cultural mores (see also Lloyd and Payne 2002). Lifelong learning is prominent in European ‘social dialogue’. It will be interesting to see whether European integration has an isomorphic effect on UK policy. Streeck’s reservation is also crucial: that if unions get too close to employers, they could be ‘incorporated’ and alienated from their members’ interests (see also Kelly 1996).

Arguably, what the various perspectives on trade union lifelong learning activity have in common is the desire for legitimacy. In an era of diminished trade union movement power and status, the union bosses may need to be seen doing something high profile or ‘strategic’. This is not to imply that union policy lacks integrity or efficacy. On the contrary, many initiatives have yielded benefits; although radical scholars (e.g. Ramsay 1977; Cressy and MacInnes 1980) would have been quick to point out the dangers of the acquiescence of labour to a capitalist agenda.

**The ‘Contested Terrain’ of Lifelong Learning?**

There are large areas where employer and trade union rhetoric on lifelong learning appear to be compatible, for example the recognition of the importance of ‘skills’ and the need for organisational effectiveness. Indeed, the moral potency of lifelong learning and skills in social and economic life is such that few would dare contest them publicly. However, any coincidence of interest is partial.

Skill and skills are words that are used widely by both camps in the lifelong learning dialectic but skill is a rather difficult concept to pin down (Gallie 1991). For the purposes of this chapter, it is perhaps most convenient to consider skill in terms of control over work. Radical labour process writers have argued that skill is *contested* (see Thompson and McHugh 2002). As Warhurst (1997: 227, 232) explains: ‘Labour process analysis, concerned with the politics of production, recognises managerial control as an imperative of the capitalist (and any labour) process for both operational and ideological reasons’, and ‘control is manifest in a managerial prerogative (however moderated) to direct, evaluate, discipline and reward labour’. Where there are tasks in the production process that enable labour to exercise specialisms or autonomy, employers concede control. Braverman (1974) argues that employers attempt to minimise this possibility (through, *inter alia*, scientific management and pre-programmed technologies) in order to assert control.

Braverman’s thesis has been criticised on a number of points; principally, the reductionist nature of his arguments and his conviction that deskilling is employers’ primary labour strategy. He also missed the fact that labour has agency and can resist deskilling (Edwards 1979). Warhurst identifies further
critiques and argues that deskilling is not the only strategy for the control of labour and that ‘responsible autonomy’ may substitute for ‘direct control’ (Friedman 1977); particularly in ‘high-performance’ work systems (see Thompson and McHugh 2002). Such practices have enjoyed periodic popularity among UK employers seeking to improve efficiency and productivity or to marginalise collectivised labour (Ackers et al. 1996). However, these have often not delivered either greater organisational performance or enriched work for employees; the rhetoric has not been matched by genuine autonomy (Marchington and Grugulis 2000; Ramsay et al. 2000). Rather, they are a normative means of workplace subordination whereby employers attempt to use symbolic and social instruments to control labour (Willmott 1993; Flecker and Hofbauer 1998; Keenoy 1999). Such initiatives by diminishing or failing to develop skills, may reduce workers’ capacity to exit and seek employment elsewhere (Hallier and Butts 1999). It is possible to locate the learning organisation version of lifelong learning in this category (Symon 2002).

If the notion of skill as control is contested, then lifelong learning is a contentious element in the politics of production. The coincidences of interest aside, numerous tensions are evident in the lifelong learning agendas of employers and labour; these are summarised in Table 10.1. Given employers’ rhetoric on the need for skills, it is ironic that the learning they seek to provide could be interpreted as ‘deskilling’ in as much as it seeks to disenfranchise workers, increase management control and intensify labour. The emotional aspects of many of these processes can lead to workers losing control of their identity as they alter their behaviour, ‘acting’ to fit in with cultural norms (Fox 1989; McKinlay and Taylor 1996; Antonacopoulou 1999).

Despite the potential for insidious subjugation, it should not be forgotten that the promotion of high-quality formal learning has considerable virtue.

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<td>Control</td>
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<td>Competitiveness (cost)</td>
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<td>Strong corporate culture</td>
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<td>Learning outcomes</td>
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However, empirical investigations suggest that where workers are encouraged – or obliged – to undertake learning (e.g. part-time FE and HE study), employers are often not prepared to allow time off or reduce expected performance levels (Kinman and Kinman 2000; Symon and Fallows 2000). Line managers often show little sympathy, casting doubt on the ability of organisations to create learning cultures (Keep and Rainbird 2000; Kinman and Kinman 2000). The learning organisation in the UK may be little more than a cosmetic exercise and a means of work intensification (Ramsay et al. 2000). Furthermore, despite Pedler et al.'s (1996) insistence that everyone in their learning company should be ‘allowed to learn’, opportunities are often confined to core and managerial staff (Lahteenmaki et al. 1999), to the concern of the trade union movement (Payne 2001).

The learning organisation also presents opportunities for the trade union movement. Huzzard’s (2000) study of Ericsson’s Norrkoping plant notes that the unions were able to harness the principles of organisational learning and learning exchange to become more effective in exerting their influence over the workplace and in their resistance to management. Unions too have structures and hierarchies, and most certainly face the issue of survival.

State policy, market conditions, new production arrangements and organisational forms have contrived to make it difficult for unions in the UK to make the sort of impact on skills that their counterparts elsewhere have enjoyed. Lifelong learning is sufficiently ethereal for any interested institution to present it in the manner that suits their agenda. Employers’ discourses of lifelong learning tend to focus on moulding flexible, compliant (or committed) employees who are prepared to assume the responsibility for gaining skills themselves. This use of lifelong learning as a means of cultural control and even as a component in union marginalisation does not enhance the UK’s skills base or secure constructive industrial relations. Without genuine state support and investment in industrial infrastructure that is conducive to high skill work, unions’ efforts to enhance skill levels will be an uphill struggle.

**Conclusion**

Lifelong learning continues to maintain its momentum, and employers and trade unions have been vociferous in their support. In some instances, these have been compatible and have given the impression of a move to partnership. But the most remarkable feature of these approaches is not how they coincide but how they differ.

There is no obligation on UK employers to engage with lifelong learning. It is possible to treat it as a cosmetic exercise and, in many cases, this is what happens. More worryingly, some employers see the appeal of engaging with manifestations of lifelong learning that espouse flexibility, adaptability and employee commitment. So lifelong learning and the learning organisation
join the relentless barrage of ‘enterprise’ discourses where programmes of organisational indoctrination serve to assert control and legitimise the managerial prerogative.

The trade union movement’s contributions to lifelong learning are both encouraging and worrying. On the one hand, intervention in, and endorsement of, the policy raises the profile of unions. More pragmatically, union action on training and development can have a positive impact on high skills and performance. There are also potential benefits for members through enhanced human capital, employability and higher wages. However, these good intentions cannot be assessed in isolation from the political economy or from material developments in production arrangements. The UK is not Germany and does not enjoy high skill/high-performance/high-trust production to the same extent (Streeck 1989, 1992). Rather, British industry has tended to gravitate towards deskilled, low-wage work in which skills can be rendered redundant by production arrangements and technology. Many firms have sought to compete in low-quality markets rather than those that require the use of high skills (Grugulis 2003). Any union pressure for upskilling that lacks statutory intervention, a radical overhaul of the education system and changes to the industrial infrastructure are struggles of Sisyphean proportions (Lloyd and Payne 2002).

In a broad sense, although lifelong learning is common property, employers and the trade union movement have different and largely conflicting expectations of it. The unions seek upskilling to enhance their position and that of their members; employers seek to use it as a means of socialisation with the intention of gaining greater control over workers. Much of the reality makes rather gloomy reading. It appears that, for all the time spent talking about its wonderful possibilities, employers would rather have a workforce that is low skilled and dis-empowered to secure short-term profits. Until the UK Government concentrates less on producing aesthetically pleasing glossy pamphlets such as The Learning Age (DiEE 1998) and undertakes some legislative intervention on training and skills, this will probably continue to be the case.

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References


