

# **The Ideological Evolution of Human Resource Management**

A Critical Look into HRM Research and Practices

# CRITICAL MANAGEMENT STUDIES

Series Editor: Albert J. Mills

# The Ideological Evolution of Human Resource Management

A Critical Look into HRM Research and  
Practices

By

Sami Itani

*Aalto University School of Business, Finland*



United Kingdom – North America – Japan – India – Malaysia – China

Emerald Publishing Limited  
Howard House, Wagon Lane, Bingley BD16 1WA, UK

First edition 2017

Copyright © 2017 Emerald Publishing Limited

**Reprints and permissions service**

Contact: [permissions@emeraldinsight.com](mailto:permissions@emeraldinsight.com)

No part of this book may be reproduced, stored in a retrieval system, transmitted in any form or by any means electronic, mechanical, photocopying, recording or otherwise without either the prior written permission of the publisher or a licence permitting restricted copying issued in the UK by The Copyright Licensing Agency and in the USA by The Copyright Clearance Center. Any opinions expressed in the chapters are those of the authors. Whilst Emerald makes every effort to ensure the quality and accuracy of its content, Emerald makes no representation implied or otherwise, as to the chapters' suitability and application and disclaims any warranties, express or implied, to their use.

**British Library Cataloguing in Publication Data**

A catalogue record for this book is available from the British Library

ISBN: 978-1-78743-390-8 (Print)

ISBN: 978-1-78743-389-2 (Online)

ISBN: 978-1-78743-460-8 (Epub)

ISSN: 2059-6561 (Series)



ISOQAR certified  
Management System,  
awarded to Emerald  
for adherence to  
Environmental  
standard  
ISO 14001:2004.

Certificate Number 1985  
ISO 14001



INVESTOR IN PEOPLE

*To my sons Emil and Oskar.  
I love you more than anything.*

This page intentionally left blank

# Contents

Abstract	ix	
Foreword	xi	
Introduction	xiii	
<b>CHAPTER 1</b>	<b>Conceptual Part – Reviewing the Literature</b>	<b>1</b>
1.1.	Critical Theory versus critical theory?	2
1.2.	Conceptualizing Ideology in the Critical Tradition	3
1.3.	Metatheory, Research Paradigms, and HRM	13
1.4.	The Ideology Critique in this Study – Giddens and the Five Forms of Ideology	18
1.4.1.	First Form of Ideology	20
1.4.2.	Second Form of Ideology	21
1.4.3.	Third Form of Ideology	21
1.4.4.	Fourth Form of Ideology	22
1.4.5.	Fifth Form of Ideology	23
1.5.	The Early Steps toward Critical Theory: Marx, Lukacs, Gramsci, and Weber	25
1.6.	The Birth of the Frankfurt School and Critical Theory	39
1.7.	Outlining Critical Theory from Horkheimer to Habermas	45
1.8.	Foucault Enriches the Frankfurt School Thought	59
1.9.	Critical Management Studies	66
1.10.	Critical HRM Studies	70
1.11.	Critique of Critical Theory	77
<b>CHAPTER 2</b>	<b>Methodology</b>	<b>85</b>
2.1.	The Background and Aims of CDA	86
2.2.	Presenting the Data	90
2.3.	Analyzing the Data	93
2.4.	The Ideological Stance of the Study	95

<b>CHAPTER 3</b>	<b>Empirical Part – Findings in Their Historical Contexts</b>	<b>99</b>
3.1.	Contextualizing HRM Historically	101
3.2.	The Early Steps Before HRM	103
3.3.	1950s — The Beginning of Modern HRM	109
3.4.	1960s – The “Organization Man” in the Hands of the Free Market	113
3.5.	Empirical Analysis Part One: 1961–1968 – HRM Naturalizes the Redefined Employment Relations	119
3.6.	The 1970s – Hard and Soft HRM	137
3.7.	Empirical Analysis Part Two: 1969–1977 – HRM’s Brief Struggle for Emancipatory Resistance	143
3.8.	1980s – A Wave of Reform	156
3.9.	Empirical Analysis Part Three: 1978–1993 – Internationalizing HRM and the Loss of the Individual	161
3.10.	1990s – HRM as a Strategic Partner	181
3.11.	Empirical Analysis Part Four: 1994–2001 – HRM Reaching its Instrumental Triumph	186
3.12.	HRM in the 21st Century – Globalization and New Career Ideals	205
3.13.	Empirical Analysis Part Five: 2002 to the Present – New Beginnings and Re-Evaluation of the Past	210
<b>CHAPTER 4</b>	<b>Conclusions and Discussion</b>	<b>229</b>
4.1.	Summarizing the Main Findings	229
4.2.	Discussing the Main Findings	235
4.3.	Theoretical and Metatheoretical Contribution	240
4.4.	Practical Contribution and Final Words	243
Appendix		247
References		255
About the Author		287
Index		289

# Abstract

**T**his book explores the ideological evolution of Human Resource Management (HRM) from the 1950s until the present day in a twofold manner. First, the study maps out the development of HRM practices as ideological control mechanisms naturalizing organizational power asymmetries, hence providing employees under modern capitalism with emancipatory awareness and opening up avenues for the theoretical development of Critical Theory. Second, it contributes to the needed metatheoretical development of the HRM field by illuminating the ideological dimensions and the normative ideals that HRM scholars create, reflect, uphold, or resist in their research. It analyzes a dataset of the most impactful HRM articles over five decades by combining Giddens's (1979) five forms of ideology and Critical Discourse Analysis. The findings reveal five distinct time periods during which HRM research and practices have been applied to control employees with varying ideological intensity, ranging from comprehensive suppression to a brief moment of emancipatory resistance. Moreover, the discursive strategies of HRM researchers principally imply an uncritical stance toward employment relationships and academia's own role in legitimizing them, which accentuates the need for creating cooperation and better understanding across paradigm borders.

**Keywords:** Human resource management; personnel management; critical theory; critical management studies; ideology; history of HRM

This page intentionally left blank

# Foreword

This is our fourth book in the Emerald CMS series and the second by a Finnish author. In the latter aspect, I am not surprised. It would not be an exaggeration to say that the depth of critical management scholarship in Finland has been underestimated. In my more than 20 years of experience of working with Finnish management scholars I have been particularly impressed by their understanding and grasp of the relationship between history and the study of organizations and management – long before the UK and central European call for a historic turn. The current volume is evidence of that phenomenon and I am more than pleased that the author – Sami Itani – agreed to publish it in the Emerald series.

Itani's central task is in revealing the “ideological forces” that have shaped the practice of Human Resources Management (HRM) over time. In the process, he sets out to expose the various historical contexts through which HRM was developed and the implications for those involved. Specifically, Itani is concerned with the way that underlying ideological pressures serve to legitimize and naturalize those aspects of HRM that polarize social inequality and support economic and human exploitation. Drawing on the work of Bill Cooke, Itani argues that the problem is not simply one of history but the unquestioned and unexplored ideological burden embedded in existing histories of management that “contributes to the legitimization and stagnation of present day practices, bodies of knowledge, power relations, and institutions.” He sets out to make sense of the ideological strands involved in histories of the field.

Outlining his approach to history and his methodological choices for studying the past, Itani acknowledges his realist acceptance and recognition of “there being a ‘reality’ out there.” However, he contends that there is not “one objective history” due to the intervention and imposition of narratives on accounts of the past. From that perspective, he goes on to focus on “the empirical nature of lived reality, material existence, and

narratives' roles in creating history." This shapes his approach to understanding HRM practices over time through Critical Theory and associated methodological strategies that include (Fairclough's notion of) Critical Discourse Analysis and Giddens' five major ways through which "ideology ... operates in society ... on the level of institutional analysis." In this way Itani maps out "the ideological evolution of HRM practice since the 1950s" to make sense of how such practices contribute to the creation, maintenance, and challenges to employee exploitation in modern organizations. Here Itani's critical aim is to "create an emancipatory awareness that can increase employee influence, autonomy, and wellbeing through engagement."

The mapping of HRM practices over time is pursued by the analysis of leading research in the field through two central questions – (1) What kind of ideological evolution have HRM practices witnessed between their emergence and the present day? (2) Can ideologically distinct periods be detected, and if so, how are they formulated? In this way, the intention is not so much "to demonstrate that HRM should be approached from a critical perspective (instead of positivist perspectives), but rather to explore what might happen if HRM and its historical development were investigated from the perspective of Critical Theory." Here Itani breathes new life into Burrell and Morgan's classic work on sociological paradigms and organizational analysis. By drawing on that framework, Itani explores the interchange between different approaches to HRM and how each reveals different and potentially useful insights into the development of the field. His use of this focus on different research paradigms is designed to encourage "metatheoretical development" to bring "paradigms closer to each other" with a view to enabling "multi-paradigm research."

The outcome is a multi-layered account of the development of HRM practices over time and the role of different ideological contexts in shaping the possibilities of accommodation and change. As such, this book will greatly contribute to our understanding of HRM practices in the post-war era and will provide the theoretical tools for future research.

Albert J. Mills  
Professor of Management,  
Saint Mary's University

# Introduction

**A**rguably some primordial forms of what we today call “human resource management” (hereinafter HRM) have existed throughout the history of all civilizations and forms of organized collective living. Although management – as we know the concept today – cannot be applied retrospectively, there is a reason to believe that people have always been led and leaders have always tried to understand and control them through what is already known and what has been successfully done elsewhere. However, while we have plausible interpretations about the historical development of the practical manoeuvres in controlling people, we know only a little about the *ideological* forces that have steered the practice over time – and will do so in the future as well. This book is a pioneering study in mapping out the ideological evolution of HRM practices and research, with a particular focus on our contemporary post-WWII era of multinational corporations (MNCs). Moreover, as the approach in unveiling ideology comes from the largely unexplored Critical Theory avenues of theorizing, this study will not only make notable theoretical, metatheoretical, and emancipatory contributions but will also play an important role in creating crucially needed understanding between epistemologically disconnected HRM research paradigms.

Next, I will introduce the aims of this study more specifically and simultaneously put forth the historical context in which HRM will be investigated. Afterward, the theoretical framework and methodology that this book relies on will be presented. I will describe the structure of the book at the end of the introductory chapter.

## Research Context and Aims

---

Although the link between history and the past is problematic (Durepos & Mills, 2012; Mills, Weatherbee & Durepos, 2014),

in order to comprehensively understand the present and plausibly anticipate the future, regardless of whether we speak about research or practice, we need to reflect critically on and try to understand history. The importance of historical perspectives in organization theory and in business research of all epistemologies – especially in the context of MNCs – has been increasingly accentuated (Jones & Zeitlin, 2011; Mills & Helms Mills, 2013; Rowlinson, Hassard, & Decker, 2014). Particularly in management studies, the dominant metanarratives of Western capitalism and the development of managerial thought remain strong and are largely unquestioned (Bruce & Nyland, 2011; Clark & Rowlinson, 2004; Ibarra-Colado, 2006). It has been argued that the prevailing views of management’s history bear a strong ideological burden (Cooke, 1999, 2003), which, if remaining unquestioned and unexplored, contributes to the legitimization and stagnation of present day practices, bodies of knowledge, power relations, and institutions. Consequently, I will attempt through this study to do my share in preventing such stagnation from happening and will critically explore the ideological evolution of HRM. Furthermore, in order to be truly thorough in my analysis, I will focus on both HRM *practices* and HRM *research*.

The history of HRM *practices* can be traced back to the late 19th century when unionization was increasing and an industrial relations movement was emerging at approximately the same time in the United States, United Kingdom, France, Germany, and Japan (Kaufman, 2007; Langbert, 2002). According to one of the prevailing interpretations of the past, industrial relations were first replaced by scientific management (also known as “Fordism” or “Taylorism”) and between the world wars by the human relations movement (Gantman, 2005; Jacoby, 2004). However, after WWII, in the late 1950s an average employee in the West began to be more educated and women also accounted for an increasing proportion of the workforce. New challenges and opportunities arose for organizational people management, which gradually gave birth to a modern-looking HRM that differed distinctly from previous forms of people management (Seeck, 2008).

Moreover, interest in operational research inspired by the war (Gantman, 2005; Thite & Kavanagh, 2009) and implemented through vast military experience provided an efficient model for the authoritarian and hierarchical enterprise of post-war Western capitalism (Grant & Mills, 2006; Robin, 2001). This all happened simultaneously when the employing organizations

started to internationalize vigorously (Kuokkanen, Laakso, & Seeck, 2010) and, as the number of mergers and acquisitions increased, decentralized into enormous and diversified conglomerate MNCs (Jacoby, 2004). Hence, it can be plausibly argued that in the late 1950s and early 1960s HRM, both as a concept and a phenomenon (Marciano, 1995), emerged simultaneously with modern MNCs.

However, although materialist wealth increased drastically in this era, particularly in the West, it has been argued that employees under modern MNC-driven capitalism were nevertheless in increasing need of emancipation from the ideological bonds that naturalized and legitimized their economic and humane exploitation and also from a polarizing social inequality (e.g., Fromm, 1956; Marcuse, 1964; Braverman, 1974; Habermas, 1984; 1987a; Fleming, 2014). To learn more about this phenomenon, the first aim of this study is to map out the ideological evolution of HRM practices since the 1950s and to increase understanding of their roles in creating, upholding, or resisting the exploitation of employees in modern, post-war organizations. By achieving this research aim, the study will create an *emancipatory* awareness that can increase employee influence, autonomy, and well-being for example through better employee engagement in organizational decision-making. The concrete research questions that guide me in meeting the first aim are as follows:

1. *What kind of ideological evolution have HRM practices witnessed between their emergence and the present day?*
  - 1.1. *Can ideologically distinct periods be detected, and if so, how are they formulated?*

With respect to the historical development of HRM *research*, in the late 1950s there was a “boom” in the significance and influence of HRM practices that could also be seen in the rapid growth of people management-related higher education programmes (Kaufman, 2007). Although already during the New Deal in the 1930s, there was scholarly focus on the human being at work (e.g., Taylor, 2008), HRM did not progress into a tangible research field until the 1960s (Morgan, 2006; Strauss, 2001). Subsequently, HRM has attracted significant interest within the academic disciplines of, for example, strategic management (Purcell, 1993), organizational behavior (Kaufman, 2002), and international business (Stahl, Björkman, & Morris, 2012). However, epistemologically,

ontologically, and methodologically the HRM field has been far from a homogenous entity and, in a slightly simplified manner, the frontlines have been drawn between “mainstream” and “critical” research paradigms (Keenoy, 2009) precisely as in organization studies in general (Adler, 2009).

The mainstream has treated HRM as a neutral, consensus-, and practice-oriented framework that is useful in a universal examination of versatile managerial practices and policies (see e.g., HRM handbook by Boxall, Purcell, & Wright, 2007). According to this view, HRM is an independent function among other managerial specialist areas with a unique focus on people and their wellbeing (Cascio, 2010) and commitment to “providing a work environment that meets employees’ short-term and long-term needs” (Bohlander & Snell, 2010, p. 4). Arguably, this focus did not emerge for purely altruistic reasons, but rather because motivated, self-fulfilling, healthy, and well-organized employees were seen as efficient employees, and through successful HRM practices a unitarist win-win situation could be crafted in reconciling the needs of employees and employers (Boxall & Purcell, 2011). However, it has been argued that the mainstream research field has become solely dominated by positivistic studies trying to prove the usefulness of HRM practices and to demonstrate a causal connection between HRM practices and company performance (Legge, 2001; Lindström & Vanhala, 2013).

Critical research, on the other hand, has tried to uncover and alter the societal structures, power relations, and ideologies that constitute and shape organizations and workplace relations (Adler, Forbes, & Willmott, 2007). By combining a critique of ideology, identity, values, employee subject, control, knowledge and their manipulation, and economic questions of material redistribution, critical scholars have aimed specifically at emancipatory research (e.g., Townley, 1993; Sewell, 1998; Zanoni & Janssens, 2004). Critical researchers perceive HRM as an integral ideological control mechanism ensuring the commitment of workers to the sectional and economic goals of the company elite, rather than a functional response to the needs of individuals in reaching their full potential as human beings (Townley, 1994; Legge, 1995/2005). Thus, instead of treating HRM as a field of specialization in management, HRM has been viewed as a manifestation of a broader ideological setting where predominant

forms of perceiving the world are shaped by taken-for-granted assumptions and asymmetrical power relations in the context of modern capitalism, where the interests of the privileged and the rest conflict (Peltonen & Vaara, 2012).

Mainstream research is accused of crafting a nice-looking but ideologically loaded discursive smokescreen (Ahonen, 2001; Guest, 1990; Keenoy, 1997) that scientifically legitimizes ethically questionable HRM practices that favor the corporate elite (Greenwood, 2013; Mueller & Carter, 2005). A basic assumption from the critical side is that management scholars are ideologists who “serve dominant groups through socialization in business schools... and provide the aura of science to support the introduction and use of managerial domination techniques” (Alvesson & Deetz, 2000, p. 84). This view contradicts the mainstream perception of researchers as relatively neutral and autonomous actors who are able and willing to conduct value-free research.

As can be anticipated from the fundamental disagreements presented above, thus far there has been hardly any understanding between the two streams of research (Keenoy, 2009; Legge, 1989; Townley, 1994; Watson, 2006). Furthermore, as has been the case with most post-WWII social sciences (see e.g., Heidegger 1954; Horkheimer & Adorno 1944; Marcuse 1964), the societal hegemony of instrumental reason has also led in HRM to domination of positivistic mainstream studies in the leading academic forums (Fleetwood & Hesketh, 2008; Keenoy, 2009), thereby leaving alternative perspectives (e.g., Critical Theory) little chance to develop (Legge, 2001). This lack of interparadigm understanding and the one-sidedness of research in the leading journals has not only caused the HRM field to neglect the study of its normative assumptions (Kaufman, 2012) and the ideologies that underpin the employment relationship within modern capitalism (Delbridge & Keenoy, 2010) but also more broadly hindered *metatheoretical* development, for which there is now much need (Delbridge & Keenoy, 2010; Hesketh & Fleetwood, 2006; Keegan & Boselie, 2006).

Considering how developing metatheories – that is, theories about the knowledge of the field, how it develops, how it is validated, and how it is linked to practice and action – can give answers to questions such as (a) what is truly “scientific” in the HRM field? (b) which epistemological, ontological, and methodological stands have gained

currency and why? (c) where are the philosophical, ideological, and moral roots of HRM?, (d) how has the field evolved and been structured throughout its history? and (e) how should the field approach its internal controversies? It is clear that mainstream scholars may also benefit from the answers to such questions and gain critical awareness of the nature of the knowledge they produce. Moreover, metatheoretical development arguably aids *all* researchers in asking important questions, building cohesion, and preventing fragmentation in the research field thereby making it theoretically stronger. Furthermore, according to Tsoukas and Knudsen (2005), such impact becomes highlighted in multidisciplinary research fields such as HRM. Additionally, metatheories would be fruitful to pursue because they bring research paradigms closer to each other and enable multiparadigm research strategies (Lewis & Grimes, 1999; Lewis & Kelemen, 2002; Robledo, 2014) that have increasingly brought theoretical depth and epistemological variety to leading academic forums throughout organization studies (see e.g., research review by Lewis & Grimes 1999), except in HRM research, where they are still largely absent.

Consequently, as a second aim of this study, I will map out the ideological evolution of HRM research in order to introduce new metatheoretical insights and bring more historical understanding, depth, heterogeneity, and opportunities for paradigm cooperation to the discipline. The research question guiding this aim is as follows:

2. *What kind of ideological evolution has the HRM research field witnessed between its emergence and the present day?*

To summarize this subchapter, I want to highlight that although I will embrace critical epistemology in this study, the underlying intention is definitely not to demonstrate that HRM *should* be approached from a critical perspective (instead of positivist perspectives), but rather to explore *what might happen if* HRM and its historical development were investigated from the perspective of Critical Theory. In addition, another thing important to explicitly clarify is that the focus of investigation is not on HRM in MNCs but on HRM *in the era of* MNCs, although the development of modern HRM has in fact vastly, but not solely, taken place in MNCs.

## Theoretical Positioning, Data and its Analysis

---

Theoretically, this study leans toward Critical Theory and its “classical” (Kellner, 2008, p. xi) interpretation, which was derived through Hegelian dialectics to Marxist theory and was influenced and developed further namely by Antonio Gramsci, Gyorgy Lukacs, Max Weber, and the Frankfurt School. Emancipation gained through *ideology critique* is the main task of classical Critical Theory, with the primary targets of critique in an organizational context being naturalization of the social order, universalization of managerial interest, suppression of conflicting interests, domination by instrumental reasoning processes, and lastly, hegemony, that is, the process through which consent is created. (Alvesson & Deetz, 2000).

Like the above-mentioned targets of critique, the sociologist Anthony Giddens (1979) has outlined five major ways through which “ideology actually operates in society... on the level of institutional analysis” (p. 193). He speaks about five constructs or forms of ideology, which are the following:

- (1) *The representation of sectional interests as universal ones,*
- (2) *Denial or transmutation of contradictions,*
- (3) *The naturalization of the present,*
- (4) *Factual underdetermination of norms guiding the action, and*
- (5) *Normative idealization of sectional goals.*

In this study, it is particularly Giddens’s conceptualizations of ideology that form the backbone of the theoretical framework and are used for several reasons. First of all, they offer a coherent and thoroughly explicated framework for investigating a highly complex phenomenon. Second, as will be meticulously explained in the literature review, the framework is in many ways loyal to classical Critical Theory, which is apparent for instance in the way Giddens accentuates the role of science and researchers in ideologically serving the needs of societal elite. Third, considering the alleged lack of critical research and excessive positivism in the HRM field (e.g., Legge, 2001), I believe that such frameworks from epistemologically critical sociology will provide novel and fruitful approaches that will revitalize HRM studies. According to Burawoy (2004), the distinctive characteristics of critical sociology include the focus on reflexive knowledge and will to

challenge the naturalized world, interaction between academic and extra-academic audience, and most importantly the tendency to question the principles of hegemonic science and especially its moral foundations.

Also, it is worth mentioning that while Giddens has been influential in management studies (Whittington, 1992), the emphasis has been on his theory of structuration (e.g., Willmott 1981, 1986, 1987) and ideas about self-identity (e.g., Alvesson & Willmott, 2002) because of which there are now calls for a broader use of his theories (Thompson, 2012). For example, Giddens's (1979) particular framework for analyzing ideologies brings depth and novelty to the HRM field where discussions on ideologies have been moving around relatively simplistic dualities, such as pluralist versus unitarist HRM (Geare et al., 2014), hard versus soft HRM (Guest, 1987), or rational versus normative control (Barney & Kunda, 1992).

The data of this study are a cluster of articles from one of the world's leading Human Resource journals, *Human Resource Management* (hereinafter *HRM* written with italics). Being established coevally with the HRM profession in 1961, *HRM* is one of the oldest journals in management studies. Moreover, *HRM* has long been the only human resource journal in the prestigious FT45 ranking and is consistently listed in the highest fourth class in the journal ranking of the Association of Business Schools (ABS). In spite of the justified critique of such journal rankings (see e.g., Macdonald & Kam, 2009; Mingers & Willmott, 2013; Willmott, 2011), *HRM*'s high placing in them is an indicator of the journal's uniqueness and significance in mirroring and shaping contemporary HRM. In addition, most studies published in *HRM* can arguably be placed in the mainstream research paradigm, which I consider to be a very positive matter methodologically, because it is natural (and presumably more advantageous) to begin development of a metatheoretical understanding with the perspective of the dominant school of thought.

Additionally, *HRM* is a justifiable source for scrutinizing and mapping out the ideological evolution of both HRM practices and research. The journal rigorously emphasizes the importance of practice and managerial implications and also embraces practice-oriented articles from international HRM academics (Human Resource Management, 2015). In fact, between 1961 and 2011 there have been 632 empirical articles, 335 practice-oriented articles, 181 purely conceptual articles,

and 39 literature reviews published in *HRM* (Hayton, Piperopoulos & Welbourne, 2011). Furthermore, considering how throughout the history of HRM the dominant practices have faithfully reflected the salient contemporary theories (Marciano 1995), and how “in the last 60 years, managers’ occupational beliefs and worldview have come to dominate ... organizational studies and practice” (Grant & Mills, 2006, p. 201), we can conclude that HRM theory and practice are in any case closely intertwined and diversely aligned.

The articles analyzed were selected because of their assumed impact. Consequently, 13–16 of the most cited articles from each decade (1960s, 1970s, 1980s, 1990s, and 2000s) were analyzed completely, from abstracts to references. This resulted in a total of 73 analyzed articles. At the end of the book, Appendix provides a comprehensive list of the articles reporting (a) the year of publication, (b) exact source, (c) name of the study, (d) author(s), (e) number of citations, and (f) the code with which the article is referred to in the findings.

As a methodological choice for data analysis, I have decided to use Critical Discourse Analysis (CDA) as introduced by Fairclough (1993, 2003). CDA offers a suitable methodology for this study because it was crafted to steer attention to how discourses linguistically settle the social world and its differing representations, with a particular focus on understanding social problems that are mediated by mainstream ideologies (Mumby, 2004; Siltaoja & Vehkaperä, 2011). In practice using CDA means that I have explored and unveiled the discursive strategies of HRM authors, which can be traced to Giddens’s five forms of ideology. There is increasing demand in HRM research for classical Critical Theory (Greenwood, 2013; Islam, 2012) and CDA (Francis, 2006), which Alvesson and Willmott (2003) mention as a combination through which one can go beyond the easily observable, explicit and superficial aspects of ideology.

Finally, when looking at “history” in this study, I do recognize there being a “reality” out there, but I admit that there is no *one* objective history, because narratives matter in constructing history. In other words, by being epistemologically critical, and acknowledging the empirical nature of lived reality, material existence, and narratives’ roles in creating history, I aim for plausibility rather than accuracy in my historical analysis.

## Structure of the Book

---

The structure of this book follows a relatively conventional research monograph pattern. After the introduction, I will first conceptualize “ideology” from the perspective of the critical research tradition in the literature review. Subsequently, a chapter covering metatheories in HRM is presented, after which Giddens’s (1979) five forms of ideology are discussed in detail. Afterward, the development and main ideas of Critical Theory are meticulously elaborated and contextualized into management studies. The literature review ends with a diverse presentation of critique of Critical Theory.

The literature review is followed by a methodology chapter. Here, I will explicate and justify the methodological framework of the study, including discussions on the analytical methods and the data under scrutiny. I will sum up the methodology chapter by critically reflecting on the ideological stance of this particular study. After the methodology chapter, the findings are introduced in a chapter that addresses each distinct time period of HRM’s ideological evolution in a separate subchapter. Moreover, each of these subchapters begins with a comprehensive overview of HRM’s contemporary history, which is essential for an understanding of the findings in their respective historical contexts. Subsequently, the research questions are answered more compactly, after which the conclusions chapter summarizes the study and addresses its contributions.

Also, in order to make the book more readable, each main chapter begins with a more detailed description of its content and structure.

## 1

Conceptual Part –  
Reviewing the  
Literature

The aim of this literature review is to provide an overview of Critical Theory to explicate *ideology critique* as it is applied in this study. To do this, I will first introduce my conceptual approach to “Critical Theory” – that is, what is actually meant by the concept in this book – and then introduce and elaborate the concept of “ideology” and particularly its three pivotal approaches in the critical tradition. Afterward, I have included a chapter covering “metatheory, research paradigms, and HRM,” following which the theoretical backbone of this book, Giddens’s (1979) five forms of ideology, is introduced.

Moreover, as will be seen, I have supplemented Giddens’s framework with related concepts from Critical Theory’s past, such as *class struggle*, *false-consciousness*, *alienation*, *reification*, *hegemony*, *instrumental reason*, *one-dimensionality*, *communicative action*, *panopticon*, and *genealogy*. These concepts are subsequently elaborated in detail, and by doing this I aim to demonstrate that: (1) Giddens’s framework is in many ways loyal to Critical Theory; (2) the framework brilliantly encapsulates the essence and versatility of “ideology” in modern societies, which makes it appropriate for the aims of this book; (3) the framework can be rightfully supplemented to make it more approachable for business and management scholars; (4) the framework can be contextualized into management and Human Resource Management (HRM) in both theory and in practice;

most of all, (5) the framework can be seen as a contemporary manifestation of a historical and dialectical process that contains two centuries of critical thinking, and hence it is an underutilized treasure for any epistemologically critical business scholar. Lastly, I have finished the literature review by introducing some central streams in criticism of Critical Theory.

## 1.1. Critical Theory versus critical theory?

---

Critical Theory has posed a significant variety of questions relating to the major assumptions of philosophy, the humanities, and social theory, as well as sharply criticized specific fields of social science such as sociology, political science, and economics. Within contemporary management studies, and elsewhere in the social sciences, Critical Theory has been generally treated in a twofold manner. For some, Critical Theory is a distinct and coherent line of thought, the philosophical and ideological roots of which can be traced through a continuum from German idealist philosophy to Marxist theory, which was impacted or developed further most prominently by Gramsci, Lukacs, Weber, Althusser, and lastly the Frankfurt School. For others, however, Critical Theory represents an umbrella concept for numerous theories that are reflecting post-Marxist thought in varying degrees. Particularly, after the advent of the philosophical linguistic turn (i.e., the central task of philosophical analysis began to be the analysis of language use), which originated in the later works of Wittgenstein (Fox & Miller, 2006), since the 1960s we have witnessed the emergence of theoretically related research fields. Examples of these have ranged from deconstructionists, poststructuralists, postmodernists, and cultural materialists to second- and third-wave feminists, postcolonialists, new historicists, and black critics, all under the umbrella of Critical Theory (Alvesson & Willmott, 2003; Burrell & Morgan, 1979; Held, 1980; Kelner, 2008).

I have chosen the former, “classical” (Kelner, 2008, p. xi) interpretation of Critical Theory as the theoretical common thread in this study, particularly as it is fundamentally intertwined with questions concerning ideology; *ideology critique* being its main goal (Alvesson & Deetz, 2000). Also, it is distinctly the original thought of the Critical Management School,

in addition to some references to Foucauldian analysis (Alvesson, Bridgman, & Willmott, 2009). The latter, “more inclusive” interpretation of critical theory will receive only limited attention despite the fact that both interpretations can fruitfully engage, challenge and supplement each other, and share apparent epistemological, ontological, and methodological similarities (Burrell & Morgan, 1979). Hence, from now on, classical *Critical Theory* will be written with capital letters and the more inclusive *critical theory* without capitals, in keeping with a similar convention adopted for example by Martin (2003) and Boje (2008).

In addition, the emancipatory aims of this study further justify use of Critical Theory, but as will become apparent later, in the context of organizational life and HRM one cannot, or should not (Steffy & Grimes, 1992; Townley, 1994, p. 182), exclude Foucault from the analysis when using Critical Theory. Hence, his ideas will partially supplement the Critical Theorists. Also, although Foucault is often portrayed as a postmodernist or poststructuralist and has had his quarrels with the Frankfurt School (see, e.g., Ashenden & Owen, 1999), in his later works he became increasingly sympathetic toward Critical Theory and emphasized how “it is this form of philosophy that, from Hegel, through Nietzsche and Max Weber to the Frankfurt School, has founded a form of reflection in which I have tried to work” (Foucault, 1994, p. 148 as cited in Alvesson & Willmott, 2003, p. 4).

Next, to properly begin the literature review, it is necessary to present and elaborate ideology, which is *the* key concept around which the principles of Critical Theory are built. Furthermore, while discussing the concept I will simultaneously touch upon its relationship with science and particularly the social sciences.

## 1.2. Conceptualizing Ideology in the Critical Tradition

---

The etymology of *ideology* derives from the Greek *idea* (“form,” “pattern”) and – *logos* (denoting discourse or compilation). The concept was first used in the dialogues of the French Enlightenment in the late 18th century (Eagleton, 1991, p. 5). Since then, there have been several ways to define this frequently used term and treat it in the social sciences; Terry Eagleton

(1991), for example, has enumerated and elaborated 16 definitions of “ideology.” Most generally, it has been argued that ideology concerns ideals, values, beliefs, and ways of exploring the world (Alvesson, 1991); but, beyond these widespread views there is fairly little consensus on the nuances of the concept (e.g., Alvesson, 1987; Alvesson & Willmott, 1992; Czarniawska-Joerges, 1988; Held, 1980).

The Oxford English Dictionary (Oxford dictionaries, 2014) defines ideology in a relatively neutral and reasonable manner as “a system of ideas and ideals, especially one which forms the basis of economic or political theory and policy.” According to this definition, for example, republicanism or neoliberalism could be seen as examples of ideologies. However, for Critical Theorists, ideology is hardly so straightforward and easily detectable. It is instead seen as a political tool that implicitly naturalizes the power of specific interest groups and in any case includes the notions of inequality and power (Giddens, 2001, p. 691). Nevertheless, even within Critical Theory there are distinct main orientations for defining ideology, all of which supplement each other despite their differences. Marx, Althusser, and Habermas have been among the most impactful intellects in providing meanings and explanations for ideologies in the critical tradition, and according to Giddens himself, it is particularly their definitions that build the basis for the five forms of ideology (Giddens, 1979), which is why I will elaborate their thoughts next.

Karl Marx (1818–1883) is without doubt one of the most prominent intellects ever to elaborate the dominant ideological questions and the consequences of them. As a young student, Marx was fascinated and strongly influenced by philosophy, and particularly the works of G.W.F Hegel (1770–1831). However, Marx came to reject what he called the idealistic and mystical nature of Hegel’s work and gradually turned to the materialistic ideas of a “young Hegelian” thinker, Ludwig Feuerbach, from which he soon moved beyond to the view that the everyday material conditions under which people live actually create the way the world is seen and understood. For Hegel, human beings create their own history, but “in conditions only partly disclosed to them in terms of their own consciousness: conditions that can only be understood retrospectively” (Giddens, 1979, p. 166). Marx rejected the latter claim and said that philosophical, unscientific ideas can be replaced by social analysis – reliable, rational, grounded, and safe knowledge – which can of course possess its own ideological function, although this can, however,

be overcome (Marx & Engels, 1965; Shivastava, 1986). Similarly, Marx denied Hegel's notion of the state and religion as reflections of the "absolute spirit" and saw them instead as creations of "man" in line with other ideological constructs (Burrell & Morgan, 1979). After this revolutionary idea of Marx, the diagnosis of ideology became a mode of penetrating beyond the human consciousness and of unveiling "the real" foundations of ideologies' operation, this being harnessed to the end of social transformation. From now on, empirical and scientific societal study could analyze and eliminate the distortion of consciousness that had taken place within ideology. For this reason in 1846 Marx, together with Engels, wrote *The German Ideology* (1965), which Althusser (1969) considered an embodiment of Marx's so-called "epistemological break." Moreover, starting from this book, Marx took distance from German idealism and moved toward a more realist interpretation of the social world and began to develop social sciences without abstract forms of philosophical arguments.

In the first chapter of *The German Ideology* (1965, p. 37), Marx and Engels wrote the following:

The production of ideas, of conceptions, of consciousness, is at first directly interwoven with the material activity and the material intercourse of men, the language of real life. Conceiving, thinking, the mental intercourse of men, appear at this stage as the direct efflux of their material behaviour. The same applies to mental production as expressed in the language of politics, laws, morality, religion, metaphysics, etc., of a people. Men are the producers of their conceptions, ideas, etc. – real, active men, as they are conditioned by a definite development of their productive forces and of the intercourse corresponding to these, up to its furthest forms. Consciousness can never be anything else than conscious existence, and the existence of men is their actual life-process. If in all ideology men and their circumstances appear upside-down as in a camera obscura, this phenomenon arises just as much from their historical life-process as the inversion of objects on the retina does from their physical life-process.

Here, they argued that ideologies produce twisted effects where the reality is the opposite of appearance. For them, it is the powerful elites that project a false version of reality, which serves

in upholding their own interests and ruling position. These false versions of reality (i.e., ideologies) can be disclosed through empirical *historical* analysis. Like the Marxist sociologist Karl Mannheim (1893–1947) later illuminated that the point in his *Ideology and Utopia* (1936, p. 3) is the following: “strictly speaking it is incorrect to say that the single individual thinks. Rather it is more correct to say that he participates in thinking further what other men have thought before him,” and by “other men” we mean people of the previous ruling classes.

Marx and Engel’s (1965) citation above did not explicitly bring forth the position and power of the ruling elites, but on page 61 they particularize that it is precisely those who rule the material production systems also control mental production in each time and place:

The ideas of the ruling class are in every epoch the ruling ideas: i.e., the class which is the ruling material force of society, is at the same time its intellectual force. The class which has the means of material production at its disposal has control at the same time over the means of mental production, so that thereby, generally speaking, the ideas of those who lack the means of mental production are subject to it.

They continue with an elucidating example of their own 19th-century Europe:

For instance, in an age and in a country where royal power, aristocracy and bourgeoisie are contending for mastery and where, therefore, mastery is shared, the doctrine of the separation of powers proves to be the dominant idea and is expressed as an “eternal law.”

One could argue that the validity of the same example is proven correct, for instance, by the 20th-century British (or Dutch, Swedish, or many other) aristocracy when they realized that the mass of the citizenry no longer accepted them as hereditary rulers. Incrementally and successfully, the aristocracy redesigned themselves into an acceptable nostalgic, picturesque, and traditional remnant, and even today we can see how they have managed to stay at the heart of capital and power. Consequently, Marx and Engels argue that philosophers, such as Hegel and the rest of the social analysts or historians, have traditionally failed to scrutinize the material basis of ideology;

they have not been able to demystify ideology but have instead written history “upside down” (like the camera obscura) from within the wave of the dominant ideas of each era. As will be seen, this idea of ideology has since reappeared regularly in the texts of some of the most prominent Critical Theorists.

Also, Althusser believed that ideologies inversely present the real state of affairs, but unlike Marx to whom ideology is a rather overt political position, Althusser states that ideology represents the imaginary relationship of individuals to their real conditions of existence (Althusser, 1977). This implies that ideologies are even more thoroughly hidden social agendas than Marx would have admitted, and that the dominant ideology “hijacks” the individual so that the current state of the social world is naturalized and cannot be seen in any other way. Althusser (1977) joins a stream of (French) essentialists in arguing that instead of “human nature” of some degree, we humans have ideology alone. Ideology structures our consciousness and is largely determined by “ideological state apparatuses.” Suppressive state apparatuses (army, police forces, law, etc.) function through force and violence, but ideological state apparatuses (political, cultural, communicational, educational institutions, etc.) function through thoughts, values, and attitudes, which mainly, but not entirely, stem from the ruling classes. However, unlike Marx suggested, these ideological state apparatuses also have freedom of their own, and they are not merely unilateral tools of capitalism obeying economic determinism.

In fact, Althusser (1969) did not consider ideology specifically as a creation of bourgeois society but rather considered it a functionally necessary feature of every type of society. In other words, ideology “is indispensable in every society, in order to shape men, to transform them to respond to the exigencies of existence” (p. 235). Nevertheless, ideologies tend to be de facto oppressive in nature because they make individuals into *subjects* who consider themselves free agents, but who are actually not. The concept of “subject” refers to theories of language as a domain in which an individual is localized (or is placed to localize) into a certain position within social structures. Althusser’s (1969, pp. 234–235) quotation below illustrates the point. Here he uses post-WWII capitalism and its characteristic rhetorics of workers’ “freedom” as an example of oppressive ideology where people’s subjects are manipulated so

that they believe that they are free individuals who have at last been liberated from domination:

In the ideology of freedom, the bourgeoisie lives in a direct fashion its relation to its conditions of existence: that is to say, its real relation (the law of the liberal capitalist economy), but incorporated in an imaginary relation (all men are free, including free workers). Its ideology consists in this world-play about freedom, which betrays just as much the bourgeois will to mystify those it exploits (free!) in order to keep them in harness, by bondage to freedom, as the need of the bourgeoisie to live its class domination as the freedom of the exploited.

Later, I will discuss how such an interpretation of ideology is fairly similar to Foucault's ideas about power and its manifestation through the individual's subject.

Another distinctive difference with Marx is that Althusser employed his concept of ideology "without making any normative judgements" (Honneth, 2004, p. 324), nor did he use it in an extremely critical sense, but rather restricted himself to a purely descriptive use of the concept (Geuss, 1981), which is an excellent example of the descriptive alignment of critical theory. Althusser did not consider the study of ideology a way to obtain a genuine or real representation of social reality, but saw it instead as integral to the constitution of social life and part of the reality at hand. For Althusser, numerous previous theories erred by presuming that ideology was an essentially passive representation of economic and political conditions, although it should be seen as the "social cement" that creates a total and imaginary existence through which and *in which* people's consciousness exists (Eagleton, 1991; Giddens, 1979). Consequently, no ideology-free state of affairs can exist in any social setting, and regardless of whether we label them "scientific" ideologies or "false" ideologies, they are all necessary conditions for human societies and the medium for individual consciousness.

On the other hand, Habermas treats ideology as distorted communication, which also became evident in his *theory of communicative action* (1984, 1987a), as will be discussed in a later chapter elaborating the Frankfurt School. Despite obvious similarities, Habermas has some fundamental disagreements with Althusser – namely with his statement that ideology is necessarily present in every place and time of each human society. Habermas (1962, 1991) argues that ideology has not always

existed but instead came into being through the development of *modern* societies and politics. Moreover, the emergence of modern societies alone did not craft ideologies. In addition, the *ideology critique* that emerged at the same time was a necessary condition. This critique was evident in open societal debate that relied on *reason* rather than traditions or the fiat of the powerful. In other words, Habermas believes that it is not possible to identify ideology without uncovering the modes in which ideas are governed by forces other than rational and conscious processes. Hence, the notion of ideology is intrinsically linked to the critique of ideology.

Although it is apparent that like Marx, Habermas has faith in the emancipatory power of science and believes that science can possess ideologically neutral forms, in his 1971 essay *Technology and science as ideology*, Habermas argues that in the contemporary era, the thorough fusion of science, technology, and bourgeoisie ideas has made science particularly vulnerable to ideological distortion. Ideology can systematically distort science and other accounts of reality, which then *conceal* and *legitimate* social asymmetries and injustices (Habermas, 1972). However, research that aims to criticize ideology can reach a state in which communication is “free from domination” and “unrestricted”: an *ideology critique* of this kind can be compared with the translation of the unconscious into the conscious. The critique of ideology hence involves uncovering the sources of distorted communication. Ideology as such is therefore not essentially a type of idea system but rather a dimension or an aspect of symbols involved in communication. Habermas (1980) lists four types of “validity claims” that implicitly exist in all communication and social interaction. If any of the claims is *not* present in any given circumstance (i.e., “symbol system”), the communication is distorted. The validity claims in communication are that (1) what is communicated is mutually intelligible between the communication parties; (2) its content is factually true; (3) each contributor has the right to act or speak in the way he does; (4) each acts or speaks sincerely. Consequently, for Habermas the *ideology critique* can and should remove the distorting ideological veils from *all* aspects of everyday life and societal superstructures – regardless of whether we speak about science, education, art, entertainment, media, law, public policy, or even the family unit.

As is made clear in Table 1.1, it can be simplified that Marx sees ideology as something contrasting with science and

**Table 1.1. Outlining Ideology Through Marx, Althusser, and Habermas.**

---

<b>Main Orientations of Understanding Ideology in the Critical Research Tradition</b>	
Marx (1818–1883)	<ul style="list-style-type: none"> <li>● Philosophical, mystical, traditional, or other “unscientific” ideas are ideological, and they can/should be replaced by reliable, rational, grounded knowledge in the form of science.</li> <li>● Through ideologies, the groups in power produce twisted effects where the reality is the opposite of appearance. Projecting a false version of reality serves in upholding their own ruling position.</li> <li>● Previous thinkers (namely Hegel) have failed to demystify ideology, as they have written the history from within the wave of the dominant ideas. Dominant intellectual ideas are expressed by them who possess the ruling material force in societies.</li> <li>● Through empirical, historical, societal science it is possible to disclose and analyze the distortion of consciousness caused by prevailing ideologies.</li> </ul>
Althusser (1918–1990)	<ul style="list-style-type: none"> <li>● Ideology represents the imaginary relationship of individuals to their real conditions of existence.</li> <li>● The dominant ideology “hijacks” the individual so that the current state of the social world is naturalized and cannot be seen in any other way. It is not a creation of bourgeois society but rather a necessary feature in any society.</li> <li>● There is no “human nature” of any degree, but rather we humans have ideology alone. Ideology structures our consciousness and is vastly determined by ideological or suppressive “state apparatuses,” which however have some degree of independence.</li> <li>● Ideologies tend to be oppressive in nature, because the ideology they push turn individuals into subjects who believe being free agents, but who actually are not.</li> </ul>
Habermas (1929–)	<ul style="list-style-type: none"> <li>● Ideologies came into being through modern societies and politics. Ideology hides in communication that is distorted, that is, ideology as such is not essentially a type of some idea systems but rather a dimension or an aspect of symbols involved in communication.</li> <li>● Ideology can systematically distort communication in science and other institutions, which then operate in concealing and legitimating social asymmetries and injustices.</li> <li>● Science is vulnerable for ideological distortion, but some forms of it can be emancipatory. Namely through ideology critique, we can reach a state in which communication is “unrestricted” and “free from domination.”</li> <li>● Unrestricted communication requires that all four validity claims are present: (1) what is communicated is mutually intelligible; (2) its propositional content is true; (3) each contributor has the right to act or speak the way as he does; (4) each acts or speaks sincerely.</li> </ul>

---

assimilating with the elite's sectional interests, Althusser as an inherent feature of the conduct of social life, and Habermas associates ideology specifically with discourse and communication. Nevertheless, they all share significantly more resemblance than differences between each other (Eagleton, 1991). They all share a common concern for the freedom of the human spirit (Marx particularly in his early writings) and see people as trapped within a mode of social organization which they both create and sustain in their everyday lives. They are concerned with understanding the manner in which this happens, with a view to setting human consciousness (or spirit) free and in that way enabling the growth and development of human potentialities.

Now, if ideologies are treated in any manner described above, why are they interesting and important to investigate, especially in the context of business studies? First of all, like any other social activity, science per se is a legitimate topic for critical theorists to explore, and the "elite" can use science as an ideological tool in legitimizing their actions. This is something that has also been strongly accentuated in the critical tradition by others than Marx, Althusser, and Habermas. For example, for the Italian sociologist and political theoretician Antonio Gramsci (1891–1937) ideologies *are* science. Gramsci (1978) argues that ideologies do not exist in themselves; they are rather deformations of scientific theories resulting from a theory becoming a "doctrine," in other words, they are no longer instruments for understanding reality, but more like a set of moral principles for orienting human behavior and actions. Hence, Gramsci's definition of ideology as "a scientific hypothesis which has a dynamic educational character and is verified and criticized by the actual development of history" puts science at the very heart of ideology formation (Forgacs & Nowell-Smith, 1985, p. 124). However, even with fewer radical assumptions regarding the nature of science, considering how the underlying interests of researchers as well as cultural, political, and gendered ideals can have their impact on methodological ideas and research practices and results, it is in any case nearly impossible to treat science as an entirely objective, pure, and nonideological activity (Alvesson & Kärreman, 2011; Bernstein, 1983; Denzin & Lincoln, 1994).

Foucault (1980) has famously taken these arguments to the same line with Gramsci in arguing that eventually all social sciences create "truth" rather than merely explore or reveal it. Loyal to Marx's history-driven analysis, Foucault has articulated in his historical investigations how science has legitimated power

by creating “scientific” forms of social control that benefit the authorities, while simultaneously restricting individual freedom. For instance, Foucault’s *Madness and Civilization* (1988b) describes how the mentally ill are made to deviate from the norm, *Discipline and Punish* (1977) describes the rise of the modern prison system and the relationship between an act of crime and the punishment following it, *The Birth of the Clinic* (1973) investigates the rise of modern medicine, and the three-volume *History of Sexuality* (1988a, 1990, 1992) focuses on how, for example, homosexuality gradually became outlawed and criminalized in Europe. Common to all these texts is the notion that science establishes a normative pattern of human behavior in order to systematically smother social “difference,” which is a potentially subversive element in societies. Moreover, the French Marxist philosopher Lucien Goldmann (1964) might have impacted Foucault’s ideas as he provided intriguing examples of how science (namely in the form of philosophy) has cooperated in each historical era with the dominant forms of culture and art in favoring influential social groups.

In addition to Gramsci and Foucault, there have of course been several other well-known critics of science, many of whom see scientific history as a series of scientific revolutions, each of which has created *paradigms*; in other words, a group of scientists have commonly agreed that their type of research has *identified* and *solved* scientific problems. Such paradigms are all ideologically bounded entities (Guillen, 1994; Shivastava, 1986) and typical targets of *ideology critique* (Burrell & Morgan, 1979). Although paradigms can be presumed to exist in all social sciences, the political nature of business schools in particular has been emphasized by many prominent scholars (e.g., Alvesson & Kärreman, 2011; Alvesson & Willmott, 1992; Burrell & Morgan, 1979, Habermas, 1972, 1980; Seeck, 2008). Especially in countries where many business schools are privately endowed, students are straightforwardly exposed to the ruling ideology (Khurana, 2010), although the public funding of business schools can also be increasingly based on a concisely defined “impact,” which can limit the research- and teaching-related alternatives of the university staff (Mingers & Willmott, 2013; Willmott, 2011).

With regard to management studies within business schools, Barley and Kunda (1992) emphasize the fundamentally rhetorical nature of management paradigms, a statement supported by Gantman (2005, p. 146), who argues that managerial paradigms are rhetorically “fictionalized” entities; that is, there is a “lack of

correspondence between the statements of the ideologies and factual reality.” These scientifically legitimized management rhetorics serve not only the organizational elite and the ever-growing number of management consultants (Gantman, 2005) and commercial textbook producers (Mills & Helms Hatfield, 1998) but also the very top of the political elite, because managerial ideologies can successfully work as propaganda weapons, particularly in times of global political tension (Grant & Mills, 2006). Additionally, it has been shown (Seeck & Laakso, 2010) how global political powers spread their ideological influence internationally through higher management education, even in countries where universities have traditionally been relatively independent of other societal institutions.

All in all, it can of course be extremely difficult to distinguish the ideological from the less- or nonideological when studying complex societal phenomenon such as people management and HRM. Nevertheless, in the business school context or in the social sciences more broadly, we cannot assume that scholars or anyone else influencing research or education processes (e.g., funding foundations, publishing houses, research leaders, editors and reviewers, interviewees if used, media, etc.) would or could act in a complete ideological vacuum, regardless of whether they are consciously aware of it. Hence, the ideological dimensions within science in general are as important to investigate as those within any other societal superstructure. Also, although Marx, Althusser, Habermas, and Critical Theorists in general see an inquiry of ideology aiming for emancipation, even a scholar with more positivistic epistemological background can benefit from such research “in order to provide a deep understanding of the nature of the knowledge produced and to provide stimulation for reflection and greater awareness of researchers” (Alvesson, 1991, p. 208). In other words, by self-critically exploring ideologies within science, one can reinforce the metatheoretical development of one’s own research field and provide a deeper understanding of why research is conducted in the way it is.

### 1.3. Metatheory, Research Paradigms, and HRM

---

The HRM research field has been accused of being particularly narrow in terms of metatheoretical understanding

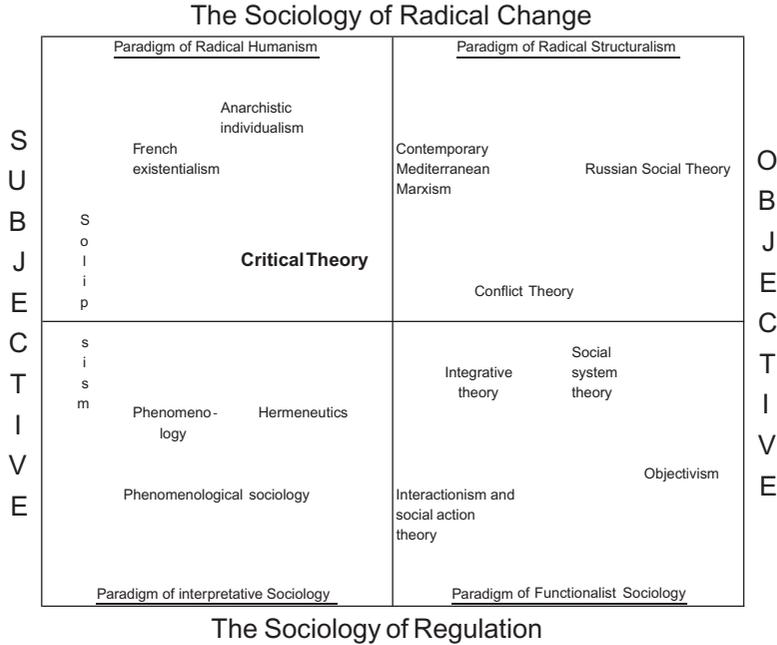
(Hesketh & Fleetwood, 2006; Keegan & Boselie, 2006), as most management studies in the context of multinational corporations (MNCs), which tend to be “resistant to adopt critical metatheoretical reflexivity” (Jack, Calás, Nkomo, & Peltonen, 2008, p. 871). According to Tsoukas and Knudsen (2005), developing metatheories – that is, theories about the knowledge of the field, how it develops, how it is validated, and how it is linked with practice and action – is necessary, particularly in research fields, which are multidisciplinary in nature. Moreover, metatheoretical reflexivity would benefit from a thorough historical approach in the sphere of organization studies, where meta-narratives of (American) capitalism are strong and largely unquestioned (Clark & Rowlinson, 2004) and phenomena that are in fact “old” get too often labeled as “new” (Jones & Khanna, 2006). The multidisciplinary nature of the HRM field is evident as it has been impacted and shaped, for example, by scholars representing organizational behavior, strategic management, psychology, organizational theory, and economics (Boxall, Purcell, & Wright, 2007). However, despite the heterogeneity, HRM research has remained passive in asking questions such as the following: How scientific is HRM in the first place, and what is considered truly “scientific” in the field? Which epistemological, ontological, and methodological stands have made themselves heard and why? Which paradigms dominate? Where are philosophical, ideological, and moral roots of HRM? How do we perceive managers and employees as human beings in organizations/societies? How are people categorized in organizations, and why? How has the field evolved and been structured through its history? How should the field approach controversies such as those related to hard/soft HRM approaches or the unitarist/pluralist debate? What kind of knowledge should HRM scholars produce to make an impact and why is this? What kind of societal and political action has emerged through HRM?

Although I do not shed light on all the above-mentioned questions in this book, my research questions touch upon some of them. Nevertheless, metatheoretical development of the field requires that these questions become asked. On the one hand, asking them opens doors for understanding and conceptualizing both the past and the future of HRM research, thereby helping researchers to ask the right questions regarding the future direction of the field. On the other hand, answering such questions can bring cohesion, enable cooperation, and evade fragmentation in the HRM field, hence making it more scientifically

advanced and theoretically rigorous, not to mention the benefits it brings in attracting and maintaining intellectual and financial resources. Lastly, one could argue that a field which is reluctant to take a step back from its own theories and assess them may not seem particularly strong and plausible to academics outside the HRM field or to “real-life” HR practitioners.

Although HRM remains metatheoretically undeveloped, distinguished studies and motivational examples for its development already exist elsewhere in organization studies. Especially *Sociological Paradigms and Organizational Analysis* – a classic book by Gibson Burrell and Gareth Morgan (1979) – is considered one of the most important and influential works that define and describe the various ways of conducting research and understanding the nature of science in relation to the organizational and societal sciences (e.g., Alvesson & Deetz, 2000; Jackson & Carter, 1991; Willmott, 1993a). Burrell and Morgan roughly divide societal studies into four main paradigms – functionalistic, interpretative, radical humanist, and radical structuralist – and further into several subcategories. Critical Theory and other research traditions that owe their vigor to *critique* are mainly located in the radical humanist paradigm, which has its philosophical roots in the German idealist tradition, namely in Kant, Hegel, and the young Marx (Burrell & Morgan 1979). However, as the paradigm boundaries tend to meander, a strict and oversimplified line cannot be drawn. Moreover, it is important to highlight that not all critical schools of thought we have today were even discussed in Burrell and Morgan’s (1979) original framework (e.g., feminism and poststructuralism), and they have been placed there retrospectively.

As can be seen from Figure 1.1, the paradigms are based on two dimensions: the subjective–objective dimension and the change–regulation debate, which is also referred to as the conflict–order debate. The radical humanist paradigm is placed on the subjective strand of the first dimension because its view of the social world is nominalist, antipositivistic, voluntarist, and ideographic. Moreover, the representatives of this paradigm are committed to challenge the societal status quo, which holds back emancipation of the masses. In other words, people are seen as dominated by the ideological superstructures within which they interact, and this builds a mental wall between them and their true consciousness. Thus, social science that is critical in the above-mentioned sense can challenge rather than confirm the “truths,” disrupt rather than reproduce cultural conventions,



**Figure 1.1.** Sociological Paradigms by Burrell and Morgan (1979, p. 29).

open up the tensions of language use rather than continue its domination, and encourage productive friction rather than serve constant consensus (Burrell & Morgan, 1979).

Despite the shortcomings of Burrell and Morgan’s paradigms (see e.g., Deetz, 1996; Donaldson, 1985; Willmott, 1993a), to my mind elucidating metatheories through such paradigms is particularly important because metatheoretical development arguably brings paradigms closer to each other (Lewis & Grimes, 1999; Lewis & Kelemen, 2002; Robledo, 2014) and creates comprehension across epistemological, ontological, and methodological borders (e.g., Hassard & Cox, 2013), which also enables *multi-paradigm research*. It is worth noticing that impactful multiparadigm studies already exist in organization studies but are largely absent from the HRM field. The lack of multiparadigm studies can mean that there is indeed room for alternative approaches, such as Critical Theory, which have thus far been largely isolated from the leading academic forums, which are dominated by positivistic mainstream studies. Furthermore, considering that “pluralism need not mean nihilism; that anything is as good as anything else, that any interpretation will do”

(Clegg, 1990, p. 16), I have no doubt that embracing pluralism would bring greater democracy to HRM analysis, and in a way “emancipate” HRM research, which would be beneficial for everyone.

Not surprisingly, the whole question concerning multiparadigm studies has also had its well-known opponents (perhaps most prominently Pfeffer, 1993, 1995) and a concept of “paradigm wars” (Jackson & Carter, 1993) has been used, although such debates have largely disappeared since the early 1990s (Peltonen, 2012). Several recognized scholars (e.g., Van Maanen, 1995a, 1995b; Willmott, 1993a) have managed to convincingly argue for the possibilities of selected forms of multiparadigm collaboration, regardless of whether we speak of epistemological or methodological choices. Also in terms of ontological differences, organization studies do not have to exist without an alternative for realism and social constructionism. For example, Thompson (2011, p. 755) adduces that in organization studies there are possibilities to use creative “mid-range” theories, and “scholars can consciously use relatively minor alternations in ontological emphasis.”

In their paper in the *Academy of Management Review*, Lewis and Grimes (1999) widely review examples of fruitful multiparadigm studies. Some of these studies (e.g., Gioia & Thomas, 1996; Lee, 1991) have used different paradigms *sequentially*, in other words, different paradigms have benefited various phases of the research process. Alternatively, another strategy has been a *parallel* multiparadigm study (e.g., Bradshaw-Camball & Murray, 1991; Hassard, 1991), where several paradigms are deployed simultaneously to elucidate a phenomenon from competing perspectives. For example, Hassard’s (1991) captivating empirical case study focused on work on the behavior of the British Fire Service, which was singly approached from the viewpoint of each of the four paradigms of Burrell and Morgan. Moreover, multiparadigm studies can also be conducted by letting the paradigms openly *interact* and reciprocally impact the analysis, which can lead to completely novel and unpredictable conclusions (e.g., Clegg, 1990; Schultz & Hatch, 1996). All these strategies demand an encompassing metatheoretical understanding of the research field under scrutiny.

Consequently, metatheoretical reflexivity is anything but unnecessary sociophilosophical speculation; it provides concrete and significant opportunities for advancing any research field and

is especially needed within HRM. Next, I will introduce the five forms of ideology as presented by Giddens (1979).

## 1.4. The Ideology Critique in this Study – Giddens and the Five Forms of Ideology

---

Theoretically, this book leans upon Giddens's five forms of ideology, which he introduced in his 1979 book *Central Problems in Social Theory: Action, Structure and Contradiction in Social Analysis*. It is through these five forms that ideology is conceptualized. According to Giddens, the views on ideology previously elaborated by Marx, Althusser, and Habermas were primarily a necessary introduction for grasping his own work. While I will later demonstrate that Giddens's framework is in line with much of Critical Theory, not least because it is concerned with emancipating those who are not in power, in general it also provides applicable guidelines for anyone conducting metatheoretical research. This is because his framework accentuates the role of social theories and academic researchers and institutions in formulating and sustaining ideologies. Put differently, for Giddens theory-makers (such as academics) are – like politicians and business leaders – in the very center of ideological power.

Through Giddens's framework, one can also avoid some of the typical traps in which a great majority of management scholars fall when scrutinizing aspects of power and ideology (as explained by Alvesson, 1991, p. 210; Alvesson & Willmott, 1992, pp. 15–16). In other words, due to the criticality, versatility, and depth of Giddens's frameworks, the focus is not on easily observable, explicit, and superficial aspects of ideology but rather on discourse and language, and in the ways meaning and legitimation are institutionally constructed, that is, in matters where ideology is not easily recognized as such but hidden behind the hegemony of taken-for-granted and naturalized assumptions. Such aspects of ideology are arguably fruitful and important to explicate and investigate in academic management research, also because the social sciences in general can be seen as a cradle of ideologically driven literature (Chomsky, 1983).

However, it is important to point out that not all management studies texts are equally ideological. For example,

Prasad (2005, p. 122) mentions that texts (e.g., research papers, news articles, etc.) are ideological when they systematically deny, conceal, and negate social contradictions while simultaneously advancing sectional (elite) interests. Naturally, one could reciprocally argue that texts are equally ideological if they advance the benefits of the “voiceless masses” by distorting or magnifying the topics under scrutiny, but within the scope of this study I have decided to follow Giddens (1979, pp. 165–197), who on the whole takes a similar line to Prasad. Giddens believes that any given body of ideas can be critically assessed for its ideological content when the five conceptions of ideology are taken into account, as the five forms reveal how “ideology actually operates in society... on the level of institutional analysis” (Giddens, 1979, p. 193).

Finally, before introducing the five forms, I find it worth mentioning how Giddens originally speaks about three (vaster) forms of ideology, while Shivastava (1986) has attentively summarized them into the following five more compact and coherent forms. Also, to my knowledge Shivastava’s (1986) study on ideologies in strategic management is one of rather few profound attempts to use Giddens’s particular framework in management studies, although papers where Giddens (1979) gives generic outlines for conceptualizing ideology do exist (e.g., Filby & Willmott, 1988). While Giddens in general has exercised a “substantial influence on management studies” (Whittington, 1992, p. 707), the emphasis has been particularly on his theory of structuration and other works regarding social structures (see e.g., Willmott, 1981, 1986, 1987) and ideas about self-identity (Alvesson & Willmott, 2002), because of which there have recently been cogent calls for a broader use of Giddens’s theories in organization studies (Thompson, 2012).

Consequently, in order to make the framework more understandable and applicable for future management studies, I have supplemented each of the five forms with related concepts from Critical Theory’s past. Although these concepts are partially overlapping (just as the five forms of ideology are), I argue that through them I can also better contextualize the five forms into (human resource) management in theory and in practice.

After presenting the five forms of ideology, I will continue the literature review by elaborating each of the related concepts in more detail and thereby demonstrate that Giddens’s

framework is a contemporary manifestation of two centuries of critical thought: a manifestation that could be used more among epistemologically critical management scholars.

#### 1.4.1. FIRST FORM OF IDEOLOGY

*The representation of sectional interests as universal ones.* By portraying sectional interests as universal, theories in any field extend the legitimacy of narrow sets of interests to the larger community. In literature, this first conception obviously derives from Marx's claim that the ideas of the ruling class in capitalist societies are also the ruling ideas. The ruling class (or any other social group) universalizes its values, interests, and beliefs to win support for them, and in persuading others to believe that the interests are common (i.e., create false-consciousness), these interests can be framed rhetorically and manipulated further through ideological hegemony.

In modern pluralist societies, appeals to the universal interests of a country's citizens, for example, with any political or economical goal, is considered desirable and unbiased. Universalization of this kind justifies use of community resources (as human resources) to fulfill these interests and is present particularly in societies with high concentration of capital. For instance, it has been argued that the former President of General Motors, Charles Erwin Wilson, claimed that "What is good for GM is good for the country" and hence universalized the interests of GM (and its elite) and allowed it to search for public policy support to enhance its own interests. Similarly, the more general interests of the elite tend to be universalized by distorting communication and enabling public discussion to take place solely in financial and instrumental terms, that is, the interests of the workers are presented only as economic commodities and as financial "costs" to the organization's management and its owners (Giddens, 1979; Shivastava, 1986).

#### *Related concepts:*

False consciousness (Marx)

Ideological hegemony (Gramsci)

Communicative action (Habermas)

Distorted communication (Habermas)

#### 1.4.2. SECOND FORM OF IDEOLOGY

*The denial or transmutation of contradictions.* Assuming that all organizations and other social systems have inherent conflicts and contradictions, presenting them as instrumental, neutral, objective, and rational agencies free of contradictions tends to favor the dominant groups in the system. This is because it is primarily the dominant groups who are responsible for the presenting. In other words, denying conflicts and contradictions serves the ideological interests of the elite by protecting the power relations favoring them, prohibiting lower classes becoming class-conscious, and preserving the status quo.

Similarly, *if* the existence of a contradiction is accepted, its real locus can be obscured. For example, everyday decision-making in MNCs or other corporations can include unpleasant choices (e.g., relating to restructuring, benefit reductions, change of job descriptions, etc.), which are often said to be rational and purely “non-political,” although in reality the choices can be affected by multiple political and subjective agendas not visible to those outside the negotiation room. Also, in societies the domain of “politics” is differentiated more broadly from the domain of the “economic,” making economic conflicts seem non-political. For example, various industrial conflicts and the class struggle taking place in working life can hence be institutionally excluded from public policy making because “politics should be kept away from the workplace.” Moreover, creating and maintaining a one-dimensional environment where the masses are passive in engaging with political activity can be supported by cultural norms and expectations propagated, for example, through mainstream media and popular culture (i.e. through the culture industry) (Giddens, 1979; Shivastava 1986).

*Related concepts:*

Class consciousness (Marx)

Culture industry (Adorno & Horkheimer)

Cultural one-dimensionality (Marcuse)

#### 1.4.3. THIRD FORM OF IDEOLOGY

*The naturalization of the present* refers to the extent to which certain sources of knowledge (e.g., academic management journals) serve existing dominance structures and uphold the status

quo by presenting the existing order of things as the “normal” order and common sense. This tendency also implicitly inhibits action toward radical change. In other words, by naturalization the body of knowledge aims to freeze social reality and make it seem eternal, beneficial for all, and completely natural. Naturalization is also one form of reification (and closely related with Marx’s commodity fetishism), because the current social state of affairs is naturalized to seem as if it were governed by natural laws and has done so throughout the history (i.e., as if it “had no history” like Foucault’s or Nietzsche’s genealogy would imply).

Through naturalization a social formation becomes detached from its historical origin and is presented as the “reality” rather than a life process. For example, neoliberal economics can include an assumption that a certain amount of unemployment needs to exist for natural reasons and to make the system function optimally. The organizational society where this happens is also taken for granted, just as the division of labor within it (taking place for instance in terms of gender or the typical superior–subordinate relationship). Additionally, in management and organization studies the mechanistic and organismic metaphors are thoroughly institutionalized into the academic jargon, turning research away from focusing on the legitimacy of politics, power, and control in organizations (Morgan, 2006). The naturalization of status quo blocks anything but superficial change and consequently perpetuates existing conditions that favor primarily the dominant groups (Giddens, 1979; Shivastava 1986).

*Related concepts:*

Commodity fetishism (Marx)

Reification (Lukacs)

Common sense (Gramsci)

Genealogy (Foucault)

#### 1.4.4. FOURTH FORM OF IDEOLOGY

*Factual underdetermination of norms guiding the action.* Social actions and decisions are steered and guided by the knowledge available to actors. What determines action norms relating to practical problems is the available knowledge from affiliated fields of research. The extent to which recommended actions are factually based defines their credibility and power to steer action.

When a field of knowledge or a research paradigm is in a dominating position and claims that its policy prescriptions and action norms are determined by facts, with or without harshly questioning its own ability to scrutinize these “facts,” it exhibits ideological characteristics and misrepresents reality.

In any case, regardless of the paradigm, it is suspicious in any social science to treat generalizations derived from causal relationships “as laws of the same logical character as those found in the natural sciences” (Giddens, 1979, p. 196). With regard to social theories and especially business studies (e.g., finance, economics, marketing, or management) within them, the dominance of positivistic research with its limited ontology, epistemology, and methodology being alone able to create empirically valid “facts is an example of ideological utilization of science. Through positivism, the mindset and everyday life of the masses can be steered toward an assumed rationality where people are evaluated instrumentally, making social categorization seem indispensable. Moreover, if a hegemonic position is reached, instrumental reason aids in alienating the individual, whose lifeworld becomes “colonized,” creating an “iron cage” of rationality. Naturally, most if not all social studies possess ideological characteristics but not all studies dominate the field to the extent that they can create a type of monopoly in revealing the scientific “truth” and in defining the social norms (Giddens, 1979; Shivastava, 1986).

*Related concepts:*

Alienation (Marx)

Iron cage (Weber)

Instrumental reason (Horkheimer & Adorno)

Colonization of lifeworld (Habermas)

#### 1.4.5. FIFTH FORM OF IDEOLOGY

*Normative idealization of sectional goals.* Perhaps, a more impudent form of protecting the interests of the dominant groups is the way social theories assume and accept sectional goals as morally acceptable and normatively correct. For example in MNCs, *formal* goals (e.g., relating to corporate strategy) tend without doubt to be the goals of the ruling groups and elite, and the idealization of these goals provides moral force and social legitimacy to the elite segments of the system. For example, Meyer (1982)

has empirically shown how organizations can possess robust ideologies and that these are manifested and sustained precisely through simplified and top-driven structures that foster ideological recognition forms and sanction unorthodox manoeuvres such as attempts to exert an influence through informal means.

Similarly, the formal goals on a societal level (e.g., legal regulations or governmental decisions supporting austerity) are assumed to be morally acceptable. Other segments of society are automatically unable to bring their goals forth as they are considered wrong or in any case illegitimate. This implies that theories give preferred status to sectional goals, as their moral or social legitimacy is not questioned. Hence, a great part of the conflict over goals discussion is exorcised out of the scope of legitimized social theories, not to mention everyday discourses. In practical life, this can lead to situations where the individual's behavior is steered or it becomes self-steered into action that favors the sectional goals of the people in power. Furthermore, such behavior and attitude toward certain authorities becomes institutionalized to the extent that it is efficiently transmitted across generations and becomes hard if not impossible to question (Giddens, 1979; Shivastava, 1986).

*Related concepts:*

- Ideological recognition (Honneth)
- Panopticon (Foucault)
- Technique of the self (Foucault)
- Organic/traditional intellectuals (Gramsci) (Table 1.2)

**Table 1.2.** Giddens's (1979) Five Forms of Ideology.

Five Forms/Conceptions of Ideology (Giddens, 1979 as Adjusted by Shrivastava, 1986)	Related Key Concepts
1. The representation of sectional interests as universal ones	False consciousness (Marx), Ideological hegemony (Gramsci), Communicative action (Habermas), Distorted communication (Habermas)
2. The denial or transmutation of contradictions	Class consciousness (Marx), Culture industry (Adorno & Horkheimer), Cultural one-dimensionality (Marcuse)
3. The naturalization of the present	Commodity fetishism (Marx) Reification (Lukacs), Common sense (Gramsci), Genealogy (Foucault)

Table 1.2. (Continued)

Five Forms/Conceptions of Ideology (Giddens, 1979 as Adjusted by Shrivastava, 1986)	Related Key Concepts
4. Factual underdetermination of norms guiding the action	Alienation (Marx), Iron cage (Weber), Instrumental reason (Horkheimer & Adorno), Lifeworld (Habermas)
5. Normative idealization of sectional goals	Ideological recognition (Honneth), Panopticon (Foucault), Technique of the self (Foucault), Organic/traditional intellectuals (Gramsci)

## 1.5. The Early Steps toward Critical Theory: Marx, Lukacs, Gramsci, and Weber

In this chapter, I will dig deeper into the foundations of Critical Theory and open-up some of the pivotal concepts that were embedded in Giddens's five forms of ideology, as presented above. The following text will proceed chronologically because one "layer" of critical thought has always been built on the foundations of the previous one, following the dialectical development tradition of the Enlightenment process.

Without doubt, Critical Theory and the ideas it represents would have never been born without the influence of Karl Marx, and particularly his early writings, which were profoundly influenced by G.W.F. Hegel. Following Marx, the two most distinct and influential thinkers in impacting the birth of Critical Theory and the missions of the forthcoming Frankfurt School were, however, sociologists rather than philosophers: Gyorgy Lukacs (1885–1974) and Antonio Gramsci (Burrell & Morgan, 1979). With regard to enabling Critical Theory to enter a context of modern-looking bureaucratic organizations, the works of Max Weber (1864–1920) – and particularly his attempts to reformulate some central writings of the early Lukacs – became pivotal (Giddens, 1987; Habermas, 1984). Consequently, in order to bring understanding to the birth of Critical Theory and to introduce some central concepts used in the critical tradition, I will next present the mainline thoughts of the above-mentioned thinkers. Naturally, I cannot present in very great detail *all* of

their ideas, but what is *most essential* to understand Critical Theory and *ideology critique* can, however, be put forth within the scope of this study.

Unlike most philosophers of the time, Hegel possessed a unique and radical view of history, as he did not see it as a random set of events linked in a causal way, but rather as a developmental process where one part cannot be understood without understanding the whole. In his magnum opus, *The Phenomenology of Mind* (first published in 1807, but the edition referred to here is from 1931), Hegel made clear how “ideas” are the only things real in the world (hence “idealism” as opposed to “materialism”), and, although imperfect, over time they can be developed toward perfection. In Hegel’s ontology, knowledge passes through a series of forms of consciousness until a state of “absolute knowledge” is reached, in which the individual unites with the “absolute spirit.” The individual exists in a world characterized by a constant interplay between human consciousness and its objectification in the external world, which has a dialectical relationship in which each influences and defines the other. Hegel’s dialectics stress that the history of our world is the history of our ideas and the way they are linked together, and gradually, always a new idea (antithesis) challenges the previous explanations and ideas (thesis), bringing forth another better theory (synthesis). Moreover, in this process of *dialectics* there is an inherent conflict between the natural and the social world, which can, however be resolved through development with the ultimate aim being a state of absolute knowledge in which human consciousness becomes fully aware of its location within the absolute spirit. Consequently, it can be said that for Hegel, human consciousness was the key to understanding the nature of the social world. Hegel believed that a perfect state and society would *inevitably* be created when people manage to enter their true consciousness through reason and progress, in other words, in order to understand the current state of affairs we must treat the preceding world history as a dialectical process leading to it (Burrell & Morgan, 1979; Hegel 1807/1931; Morrison, 2006).

Hegel’s ideas were subsequently cultivated further by “right” Hegelians, who were loyal to Hegel’s philosophy basically in its entirety, and by “left” or “young” Hegelians, who wanted to use Hegel’s thoughts for fundamentally different ends. As introduced before in defining ideology, Marx was to follow the left Hegelians. Marx employed Hegel’s dialectical analysis methods and historical perspective, but he placed the individual within the

means of production, rather than the absolute spirit, in the center of the analysis. Not the absolute spirit, but man himself has created the conditions around him. Hegel's vindication of the modern state as the ultimate manifestation of reason was for Marx nothing more than an ideological formulation of a problem that had to be *worked on*, and it is emancipatory philosophy that can make man change the surrounding society through self-consciousness (Wellmer, 1987). Marx faithfully argued that theories targeted toward practical action (which can also be called "emancipatory" theories) are imperative because they enable self-consciousness, and if an individual becomes conscious, he will simultaneously change himself (Eagleton, 1997). Such revolutionary ideas about the very foundation of contemporary philosophy have since linked Marx to other famous "anti-philosophers" such as Nietzsche and Wittgenstein, although he was primarily an economist. Consequently, for Marx, the philosopher's role is not to wait for something inevitable to happen or to withdraw from impacting the future as if one could only have wisdom in hindsight (like Hegel argued), but to emancipate man and *change* the world around us (Marx, 1843/1970).

To understand and subsequently change society, in his early *Critique of Hegel's Philosophy of Right* (1843/1970) and particularly in *Economical and Philosophical Manuscripts* (1844/1959), Marx elaborated the necessary premise of the *alienation* of man. Marx considered the phenomenon of alienation a tool with which to attack the societal status quo and the deficiencies of the capitalist production system, which he saw as the primary reason for alienation. To my mind, Burrell and Morgan (1979, p. 298) conceptualize Marx's alienation more concisely than Marx himself did:

[Alienation is] the state in which, in certain totalities, a cognitive wedge is driven between man's consciousness and the objectified social world, so that man sees what are essentially the creations of his own consciousness in the form of a hard, dominating, external reality. This wedge is the wedge of alienation, which divorces man from his true self and hinders the fulfilment of his potentialities as a human being.

Marx (1844/1959, 2007) rationalizes that capitalism alienates workers from *the products of their labor*, that, from the things they make but over the design-and-production protocol of which they have no control. Neither do these things ever become their own. For Marx, only animals engage in self-sustaining

action that does not have a conscious intention or future intention; similarly, the exploited workers are unable to be free “subjects” that produce their own purposeful “objects.” Marx argues that “conscious life activity” distinguishes humans from animals, for whereas animals are “immediately one” with their life activity, we human beings make our life activity the object of our consciousness and will. Thus, Marx emphasizes the rational planning of “activity,” which is followed by a sharper focus on the human capacity for social production and creates products in a consciously planned, nonmechanical manner. Consequently, in addition to things, workers are also alienated from the *activity of work* done for someone else in a machine-like and noncreative manner and with the demeaning lowest possible wage that maintains a maximum rate of return on the capitalist’s investment capital. Here, we can see how for Marx work (in its undistorted form) is far more than mere economic activity. It is rather a source of human identity, inspiration, and dignity (Prasad & Prasad, 1993).

Workers are also alienated from other *people* and from *themselves* because competition, rather than cooperation, is presented as the natural state and keeps man from realizing his “species-essence” (the human nature) as an emotionally and practically social and benevolent being. Hence, being alienated from oneself and from the other are closely linked, which makes Marx (1844/1959, p. 33) conclude as follows: “when a man confronts himself, he confronts the other man.” Marx perhaps assumes that there had been a time and a place where people lived in harmony with themselves and nature, but now “man (the worker) only feels himself freely active in his animal functions – eating, drinking, procreating [making offspring], or at most in his dwelling and in dressing-up, etc.; and in his human functions he no longer feels himself to be anything but an animal” (p. 30). All this makes alienated people profoundly dissatisfied and unhappy, although they may not be consciously aware of it.

Marx observed industrialization as a part of the overall rise of the capitalist production system in the developed West. He famously argued – and demonstrated more or less scientifically – that there is an inherent contradiction between capital and labor: from raw materials labor produces goods that are then sold on the markets, but the profits remain only in the hands of the owner of the plant or factory. As labor receives none of the surplus value from selling the product, the owner exploits the worker, which is a dilemma built within the very structures of capitalism, particularly because Marx did not consider owning

and risk-taking work. In their 1848 *The Communist Manifesto*, Marx and Engels (1948) state how this tension between the owners and workers turns into a class society and creates a class struggle, present in “the history of all hitherto existing society” (p. 9) – not only between the contemporary ruling (capitalist) and ruled (proletarian) classes – and eventually causing the very identities between the two groups to diverge from each other. Subsequently, both capital and labor (the proletariat) become highly concentrated, up to the point at which labor inexorably realizes their position of alienation and exploitation.

Labor, which refers here to practically all the people who work for a wage, eventually reject the ideologies that misled them into accepting their situation and abandon the “falsely conscious” valuation of their place in the society. This Marx called *class consciousness*; a concept which Lukacs in particular was later to refine further. Class consciousness is an initializing force for revolution, but it always requires an “objective” reality of large numbers of workers sharing the same position and a “subjective” awareness of their shared position and recognition of the existence of another class with opposing interests, and also of a production system in which contradictions and misery are inherent (Marx, 2007; Marx & Engels, 1948).

It is important to understand how fixed and profound the class tension was for Marx. One nearly always inherits one’s social class; labor works at tasks similar to those of their parents and the ruling classes always have more opportunities for education and using various tools and technology to create more surplus value. Another prominent feature in the class struggle is that one individual has little or no possibility to alter the structures around him, which is why the exploited groups have to unite and become class conscious. The perception on the part of individuals that they are unable to exert an influence is an essential feature later examined by Critical Theorists in the context of 20th-century organizations and institutions.

It is a common interpretation that in his later years Marx rejected German idealistic epistemology, hence making his later works less impactful for Critical Theory and other “Western Marxism.” For example, Lukacs, Gramsci, Weber, and the whole of the Frankfurt School were distinctly influenced more by the idealist (later also known as “human” or “classical”) than materialist (“structural” or “orthodox”) works of Marx (Bernstein, 1987; Burrell & Morgan, 1979; Eagleton, 1991, 1997; Scherer, 2009). Next, the idea of the “fetishism of commodities” will be

introduced. Although, Marx elaborated the fetishism of commodities most profoundly in Part I (published in 1867) of his *Capital* (1990), a tripartite epoch of his later years, I find it necessary to discuss it in order to supplement the alienation thesis and to explain Critical Theory's often-used concept of *reification*.

In ancient religions, fetishism referred to the belief that inanimate and motionless objects (e.g., icons, clouds, stones, etc.) possessed human properties. In Marxism, it is commodities that are believed to possess human properties. Marx obtained this idea from Immanuel Kant (1724–1804), who was Hegel's greatest inspiration and the "father" of German idealism. Kant (1794/1996) drew a line between real religious thought (concerned with the true nature of God and of man and the relationship between them) and unreal religious thought (concerned with mysteries and rituals), which he considered "fetish-faiths" (p. 209). Fetish-faiths describe the way in which people project themselves subjectively onto the world of ordinary inanimate objects, which are falsely seen to embody some sort of mysticism. Marx (1990, p. 165) presents the same fetish-faith toward commodities in the following manner:

As against this, the commodity-form, and the value-relation of the products of labour within which it appears, have absolutely no connection with the physical nature of the commodity and the material relations arising out of this. It is nothing but the definite social relation between men themselves which assumes here, for them, the fantastic form of a relation between things. In order, therefore, to find an analogy we must take flight into the misty realm of religion. There the products of the human brain appear as autonomous figures endowed with a life of their own, which enter into relations both with each other and with the human race. So it is in the world of commodities with the products of men's hands. I call this the fetishism which attaches itself to the products of labour as soon as they are produced as commodities, and is therefore inseparable from the production of commodities.

In other words, because the ideological illusions of bourgeois society and the capitalist production systems have alienated people, they do not realize that the value of the commodity comes from their *own labor*, not from any independent properties of the commodity itself or from some working logic of the market. Consequently, both the commodities and markets are treated as

objective realities independent of human control and capable of dictating decisions and actions. Therefore, falsely conscious people are incapable of being genuinely happy and their consciousness has been reduced to a commodity relationship where things are valued over social relationships and other people (Marx, 1990). Not surprisingly, a pivotal target of critique by the Critical Theorists of the 20th century became the tendency of capitalist consumerism to turn much of our social life (in the form of romance, holidays such as Christmas, education, health care, hobbies, etc.) into commodities that are measured and valued with money.

After Marx, commodity fetishism became a widely covered topic in the critical tradition, and for example, Horkheimer and Adorno (1944/2002), Marcuse (1964), and most recently Honneth (2008) have discussed it at length. However, they all referred mainly to “reification” – fetishism’s source and superordinate concept – following Gyorgy Lukacs, who first covered the topic in detail in his *History and Class Consciousness* (1971), which was written in 1923. Lukacs, who has been seen as the initiator of Western Marxism and called the “greatest Marxist theorist of the twentieth century” (Gouldner, 1976, p. x), uses reification (Latin for “res facere”: “to make a thing”) to describe this phenomenon:

Because of this situation [Marx’s fetishism of commodities] a man’s own activity, his own labour becomes something objective and independent of him, something that controls him by virtue of an autonomy alien to man. (1971, pp. 86–87)

However, Berger and Luckman (1967, p. 89) offer perhaps a more concrete and precise definition by stating:

Reification is the apprehension of the products of human activity as if they were something else than human products – such as facts of nature, results of cosmic laws, or manifestations of divine will. Reification implies that man is capable of forgetting his own authorship in the human world, and further that the dialectic between man the producer, and his products is lost to consciousness. The reified world is, by definition, a dehumanized world. It is experienced by man as a strange facticity, an *opus alienum* over which he has no control rather than as the *opus proprium* of his productive activity.

Consequently, Lukacs's (1971) reification has two sides. First, people fail to see that certain social structures are created and sustained only by their own actions. This is something that the classical social constructionists have focused on. They can scrutinize how people are becoming "prisoners" within their own social constructions. Some common and powerful reifications are, for example, naturalized notions of intelligence, leadership styles in organizations, or ideas of female/male abilities (Prasad, 2005). The second side of reification is how these socially created structures break the bond between the product and the producer; the social relations embodied in the product by virtue of the production process now seem as if they were natural properties. Put differently, something abstract (the implicit assumptions of social relations) now appears concrete. Lukacs saw this as a *specific* problem of modern capitalism, but Giddens (1979) argues that it is an equally prominent feature in communist nations as well. However, there is a reason to believe that no Marxist or any other thinker of the 19th century or early 20th century could have imagined the hegemony of commercialized brands, symbols, and mental images of the 21st century (Klein, 2000). The Frankfurt School (e.g., the above-mentioned works of Horkheimer, Adorno, and Marcuse) has traditionally focused on this second side of reification, but in Giddens's (1979, p. 195) five forms of ideology, *naturalization of the present* refers to reification particularly in the uppermost way.

In addition to reification, the rest of the best-known Lukacsian sociology also remained loyal to the young Marx and Hegelian idealism (although Burrell & Morgan, 1979, p. 285 argue that Lukacs's mid-period works were more orthodox Marxist as it was necessary for him "to survive" in the Hungary of the Stalinist era). Lukacs (1971) emphasized the importance of ideology, literature, and art in understanding capitalism, but it was the class consciousness of the proletariat in particular that played a key role for him. He was of the opinion that the proletarian class had the potential to comprehend the "totality" of capitalism; he was referring to a holistic understanding of the subjective and objective elements that are combined within the dynamic, structured, and complex process of capitalism (Burrell & Morgan, 1979). Lukacs sought a more humane and less authoritarian approach to the class struggle than for example the model adopted in the USSR. Whereas (Marx & Engels, 1948) firmly believed that revolution was

inevitable once the proletariat had achieved class-consciousness, Lukacs rejected this as a simplification and emphasized the need for active, gradual, and constructive cooperation between the Communist Party and the working class. For Lukacs, alienation in the form of reification is something to be overcome, and when this has been done, the reconstruction of capitalist society can begin (Lukacs, 1920/1972). However, there are no objective and general laws for societal development as was thought in the USSR; hence, the revolution of the working class might equally fail, for instance due to weak leadership and tactics (Burrell & Morgan, 1979).

Another prominent Marxist thinker of the early 20th century, who was often associated with Lukacs, although they did not influence each other, was Antonio Gramsci (Burrell & Morgan, 1979). Gramsci became a Marxian political activist already in his early 20s, and the Bolshevik revolution in October 1917 further advanced Gramsci's revolutionist aspirations (James, 1977), Gramsci's political career with the Italian Left advanced most between 1921 and 1926, until the rise of Mussolini and fascism, which he fervently resisted. Gramsci continued to write even after being sentenced to prison for 20 years in 1926 (he died in prison in 1937). Much of Gramsci's works, particularly his collection of *Prison Notebooks* (1971), are pre-occupied with the question of maximizing the contribution of *intellectuals*; a necessity for enabling a sustainable revolution to the cause of the proletariat while minimizing the threat which they posed to it (see e.g., Simon, 1982 for an overview of Gramsci's theory of intellectuals). The significance of Gramsci's idea about the intellectuals was also to become pivotal for the later development of Critical Theory.

Gramsci believed that in order to make a revolution in the capitalist West, the communists would need a significantly more sophisticated strategy than that possessed by the Bolsheviks in unindustrialized peasant Russia. According to Gramsci (1971, 1978), Marxism has to be developed further by uniting theory and practice. In other words, in a well-functioning Communist party, the leaders and the led are in a state of transformation and do not confront each other. The objective is "to create the conditions in which this division [between leaders and led] is no longer necessary" (Gramsci, 1971, p. 144). For Gramsci, intellectual theorizing in the first place is needed primarily because the consciousness of the working class is more complex than Marx

himself realized (Krabel, 1979). Gramsci's (1971, p. 333) following lines illustrate this point:

The active man-in-the-mass has a practical activity, but has no clear theoretical consciousness of his practical activity, which nonetheless involves understanding the world in so far as it transforms it. His theoretical consciousness can indeed be historically in opposition to his activity. One might almost say that he has two theoretical consciousnesses (or one contradictory consciousness); one which is implicit in his activity and which in reality unites him with all his fellow-workers in the practical transformation of the real world; and one superficially explicit or verbal, which he has inherited from the past and uncritically absorbed. But this verbal conception is not without consequences. It holds together a specific social group, it influences moral conduct and the direction of will, with varying efficacy but often powerfully enough to produce a situation in which the contradictory state of consciousness does not permit of any action, any decision or any choice, and produces a condition of moral and political passivity.

What he means is that the working class indeed needs revolutionary consciousness, but it is not something that can be transmitted to them externally, but rather something already implicitly present in their activity. It has to be "teased out" with the help of intellectuals and education. After all, "*all* men are intellectual" (Gramsci, 1971, p. 9) or at least have the potential to be. For example, in Lenin's interpretations of Marx, the revolution needs external vanguards (like Lenin). Gramsci, however, was of the opinion that although all proletarians possessed revolutionary consciousness, their inherited and "uncritically absorbed" worldview made them passive toward political action. Of course, in an ideal case the masses could be self-emancipating. However, unlike the intellectuals, the masses lack an awareness of the sophisticated form of their own theoretical consciousness (Gramsci, 1971; Krabel, 1979).

To generate a revolution and emancipate the masses, Gramsci speaks about the particular importance of "organic" intellectuals of the proletariat. For Gramsci, there are two types of intellectuals – *traditional* and *organic*. To start with, Gramsci (1971) argues that every social group emerges out of a previous economic structure, and every existing social group creates

within itself one or more strata of intellectuals that give it meaning, keep it together and make it function and organized. Traditional intellectuals regard themselves “as autonomous and independent of the dominant social group” (p. 7), and also the population at large sees them that way. Regardless of the social turmoil, these intellectuals may have to face, they do have the aura provided by centuries of historical continuity. Typical examples include artists, professors, and philosophers. They are what people tend to think of when they think of intellectuals. However, for Gramsci, their autonomy (or that of anyone else) is nothing but myth and delusion; traditional intellectuals are essentially conservative, they are allied to the ruling societal group and ideology, and they assist them.

The organic intellectuals, on the other hand, openly emerge from within the dominant social group (ruling class). They are produced by the educational system to perform a function (often a new one) for the society’s dominant group and work as their organizing and thinking element. As in Hegelian dialectics, organic intellectuals constantly improve the past creations that favor the ruling class and maintain their power. For example, all phases of the industrial revolution (the invention of the steam engine, telegraph, ways to mine iron, Ford’s assembly line of cars, etc.) have displaced the previous inventions and kept the ruling class in place; all this development has been enabled by a holistic capitalist culture that enables, stimulates, and encourages such actions (Gramsci, 1971; Hobsbawn, 1974; Monasta, 1993; Simon, 1982).

Traditional intellectuals are of course also important, and for example Marx, Lenin, or Gramsci himself can be placed in this category. However, as mentioned before, for Gramsci they are not generally as independent of the ruling classes as they think they are, and the number of traditional intellectuals cannot be compared to the number and, hence, potential of organic intellectuals. The problem for Gramsci (1971, 1978) was that the bourgeoisie have reached their own ruling position because they, thanks to a substantial economic base that originated in feudal society, have been remarkably successful in nurturing and sustaining sufficient numbers of organic intellectuals. However, in the context of the Western capitalist states, socialists lack the economic and institutional base (most importantly education and media) needed to cultivate sufficient numbers of their own organic intellectuals. Here, Gramsci (1978, p. 50) was rather clear; “the proletariat cannot form its own stratum of

intellectuals except very slowly, very laboriously and only after the conquest of State power.” In other words, the Communist Party provides a certain potential for creating organic intellectuals, but without a sound economic base the proletariat can hardly seize the key institutions and state apparatuses to craft enough of them. How is the proletariat to make the revolution then? Here, we come to Gramsci’s distinguished theoretical achievement, the concept of *ideological hegemony*, which has since not only been recognized as Gramsci’s tremendous contribution to Critical Theory (Levy, Alvesson, & Willmott, 2003) but also of great significance for the 20th-century’s intellectual universe in general (Carlucci, 2013).

In 1932, Gramsci (1973, p. 235) wrote that the concept of hegemony is the “essential ingredient of the most modern philosophy of praxis.” He was profoundly disturbed by the fact that although Marxist thought and the European working-class movement had already existed for over a half a century, the socialists had not been able to take power and emancipate the exploited workers in the West. Hegemony provided a framework for understanding how the seemingly old-fashioned bourgeoisie had had almost no difficulty in maintaining their power over the revolutionary proletariat. For Gramsci, this meant that the socialists cannot seize and retain power through the mechanistic determinism of a dictatorship (Burrell & Morgan, 1979), such as in USSR of the time. A more idealistic mode of counter hegemony activated by spreading awareness of the phenomenon was required. Krabel (1979, p. 31) mentions that for Gramsci “hegemony denotes more than a superficial influence on the passing political views of the masses; it encompasses their entire way of conceiving the world and of interpreting everyday experience.” Through hegemony, the bourgeoisie could dominate by manipulating the *culture* of the society – the values, beliefs, perceptions, and explanations – to the extent that their ruling class worldview becomes *the* worldview that is perceived as the cultural standard, as the universally valid reigning ideology, which justifies the economic, political, and social status quo as natural, inevitable, everlasting, and advantageous for all (Forgacs, 2000; Simon, 1982). In other words, hegemony makes an individual think that the existing social order is due to natural reason; it is *common sense*. Consequently, hegemony is an ultimate form of ideological and intellectual power, and unlike Marx believed, it proves that ideas will always dominate over pure material or economical force (Gramsci, 1971).

Most of Gramsci's writings did not become public or were not translated from Italian until the end of the WWII and fascism in Italy. Thus, the concept of hegemony was used most by the later, post WWII, Frankfurt School scholars, and especially in relation to the emergent mass media and popular culture, which served as tools in creating hegemony and consent (Marcuse, 1964). Moreover, in addition to Critical Theorists, a broader group of critical intellectuals have also used hegemony and other Gramscian thought. In the aftermath of the student riots in the 1960s, a great number of exploited groups joined forces with labor, and subsequently both hegemony and intellectual power were addressed in, for example, feminist studies (Irigaray, 1985; Martin, 2003), postcolonial studies (Saïd, 1978, 1993), and postmodernism (Derrida, 1972).

Next, before turning to a chapter on Critical Theory and the Frankfurt School, I will briefly introduce the German intellectual Max Weber. I will get back to Weber in relation to his thinking on management when presenting the history of HRM in the empirical part of this book, but in order to contextualize Weber within the critical tradition, a few words would be in order at this point.

Although Weber cannot be considered particularly Marxist in his political views, he did share Marx's concern and distrust regarding the social consequences of capitalism, albeit without the commitment to establishing a socialist world order or revolutionary struggle (Burrell & Morgan, 1979; Prasad, 2005). While much of traditional Marxist thought focuses on exploitation and domination within the capitalist production process, Weber (1968) scrutinizes social domination within the *administrative* realms of capitalist society. Moreover, he prominently saw the "subsystems of purposive rational action irresistibly congealing into an *iron cage*" (Habermas, 1984, p. 333), which is not far from Lukacs' ideas of reification and his critique of instrumental reason. In other words, "iron cage" was used as a metaphor to explain the alienation generated by the structural instrumental rationality of the bureaucratic organizations of the late 19th and early 20th centuries. Here, I, however, want to introduce Baehr's (2001) analysis of Weber's works. Baehr questions the "iron cage" translation (by Parsons) and instead argues that "shell as hard as steel" would be an accurate citing of Weber, which arguably takes on different connotations. This is, for example, because steel, unlike iron, is emblematic of

modernity as it is a product of human fabrication. Baehr's (2001) analysis is a brilliant example how history is indeed socially constructed, and one interpretation of the past can begin to live its own life through, for example, inaccurate original translations.

For Weber, rationality had multiple forms and he treated rationalism as "a historical concept which covers a whole world of different meanings" (Weber, 1930, p. 78, as cited in du Gay, 2009). "Emotive rationality" and "traditional rationality" have perhaps received less attention after his death, unlike his distinction between "instrumental rationality" and "value rationality" – a distinction that the Frankfurt School scholars were to cultivate further as I will soon elaborate. Through instrumental rationality, the bureaucratic organization aimed to remove all subjective (e.g., emotional and irrational) aspects of work. Weber was convinced that bureaucratic and instrumental organizations provide a highly efficient solution for organizing people in firms, but he was pessimistic with regards to the withdrawal of value rationality from organizations, as this would "transform human interaction and behaviour into a dreary quasi-mechanization, bereft of sensuality, spirit and culture" (Clegg & Lounsbury, 2009, p. 119). Hence, like Marx, Weber believed that alienation emerged from people's perceived lack of control and freedom at work, which imprisoned their (assumed) free spirit.

Although Weber the economist is generally associated with the emergence of the bureaucratic organization (Watson, 2007), it is Weber the sociologist who became pivotal for the birth of Critical Theory and who is still the most fundamental building block for understanding 21st-century sociology as well (Davis & Zald, 2009). In addition to domination by administration, Weber's writings about the connection between Protestantism and modern capitalism, secularization of Western culture, and the development of modern societies from the perspective of rationalization all shaped Critical Theory. Weber also uniquely explored the connection between the latter two in favoring "the organisational cores of the capitalist enterprise and the bureaucratic state apparatus" (Habermas, 1990, p. 2), and understandably, for example, Horkheimer, Adorno, and Habermas, the backbones of the Frankfurt School, all obtained abundant inspiration from him (Giddens, 1987; Greisman & Ritzer, 1981).

## 1.6. The Birth of the Frankfurt School and Critical Theory

---

In this chapter, I will elaborate the main ideas of the Frankfurt School, which can be rightly used as a synonym for Critical Theory (e.g., Burrell & Morgan, 1979; Wiggershous, 1994). However, the limits of this study do not allow presentations of the contributions of every intellectual considered to be a member in the Frankfurt School. Hence, the focus will be on those who have had the most impact on the *ideology critique* and Giddens's five forms of ideology, and also on those whose ideas have been significant for the birth and development of Critical Management Studies (CMS). Consequently, in the manner of the outlines drawn by the CMS scholar Scherer (2009), I will elaborate the main ideas of Max Horkheimer, Theodor Adorno, Herbert Marcuse, and Jürgen Habermas, at the expense of, for example, Walter Benjamin, Leo Löwenthal, Erich Fromm and Alfred Schmidt. Moreover, as rationalized earlier, I also find it necessary to present some of the central ideas of Michel Foucault. A subchapter covering CMS follows, including discussions on its subdivision Critical HRM and its divergences from mainstream HRM studies, and also on previous studies of HRM's ideological development. All these together create a continuum that furthers understanding of Giddens's (1979) five forms of ideology and contextualizes them in management studies and the HRM phenomenon.

In 1923, the Frankfurt Institute of Social Research of Goethe University was founded by Carl Grünberg. It was the first Marxist-oriented research center in a major German university. In 1930, Horkheimer took over as the director of the institute, and it was during his directorship that the institute was transformed from an orthodox Marxist school to a school embracing more heterodox approaches to critical social theories, gained broader fame and recognition as a herald of “cultural Marxism,” and became more broadly referred to as the “Frankfurt School” (Jay, 1996). Horkheimer recruited talented and like-minded philosophers and sociologists to his institute (e.g., Adorno and Marcuse); the premise of whose works was the idea that although the social sciences could not produce value-free and objective knowledge of social reality, they could produce value-relevant knowledge (Horkheimer, 1937). Furthermore, the scholars wanted to actively participate in developing a rational,

humane, and just society, and they disagreed with traditional approaches to social theory that were explanatory in nature and aimed merely to *understand* the societal state of affairs. Horkheimer and his recruits believed that all individuals can become aware of their conditions of subordination and oppression and gradually obtain stronger civil rights and individual autonomy as long as *researchers* understand that “all social patterns take shape within historical and cultural conditions and that the methods used to analyse these conditions are also embedded within the same social contexts” (Scherer, 2009, p. 31).

Frankfurt School scholars dedicated much of their work to show how modernism was based on myths, had acquired arbitrary authority, protected the benefits of new dominant groups, and subordinated social life to technological rationality. However, the Frankfurt School never declared modernism or the Enlightenment project dead but rather considered them sick and saw hope in redirecting the future misconceptions and correcting existing ones (Alvesson & Deetz, 2000). In other words, although the Frankfurt School scholars were generally loyal to the Enlightenment project, they were strongly opposed to the prevalent positivistic research. Positivists had acquired a hegemonic position with their successful attempts of objectively explaining natural phenomenon through natural science and had then systematically excluded the normative-ethical dimension of reason from scientific analysis. The Frankfurt School scholars considered positivistic research as bourgeois in nature with its presumptions that scientists can have an objective and instrumental relationship with their research objects and value judgements can be relegated to other spheres of everyday life (e.g., politics). Horkheimer (1975, pp. 209–210) denied the bourgeois division between science and politics with statements such as the one below, where he contradicts critical thinking with mainstream science which is not interested in idiographic research approaches in which one thoroughly contextualizes the individual within the surrounding society:

The scholarly specialist “as” scientist regards social reality and its products as extrinsic to him, and “as” citizen exercises his interest in them through political articles, membership in political parties or social science organizations, and participation in elections. But he does not unify these two activities, and his other activities as well, except, at best, by psychological interpretation. Critical

thinking, on the contrary, is motivated today by the effort really to transcend the tension and to abolish the opposition between the individual's purposefulness, spontaneity, and rationality, and those work-process relationships on which society is built. Critical thought has a concept of man as in conflict with himself until this opposition is removed.

After Horkheimer's (1937) *Traditional and Critical Theory*, emancipation through *ideology critique* had become the most prevalent aim of the Frankfurt School, and the outlines of Critical Theory were becoming clear. Emancipation was to be achieved through self-conscious critique that does not dodge social change and does not get stuck in its own doctrinal assumptions. Horkheimer (1937) highlights the importance of Hegel and particularly Marx but rejects the contention that there is one absolute truth or one epistemological stance of idealism or materialism. Rather, Critical Theory should seek a position outside strict philosophical categories, because all epistemologies were argued to eventually distort reality in order to benefit some selected groups of people. However, Marxism tends to provide the tools and methods for Critical Theory in practice, as it also aims to enable increased public awareness of the subversion of ideological forces and origins of domination, which will together initiate radical changes in consciousness and power (Held, 1980).

In addition to the (young) Marx and his social theory, the principles of the Frankfurt School were largely built on Nietzsche's perspectivism (i.e., the world is knowable, but also interpretable with countless meanings depending on one's perspective: for a thorough elaboration of the concept see Nietzsche, 1968), on Freud's complex human subject, on a nondualistic constructionist account of experience and language, and particularly on Weber and his critical analysis of rationality. However, whereas Weber's context was specifically businesses, factories and modern Fordist assembly lines, the Frankfurt School thinkers steered attention from the organization of production processes toward broader *culture* and *consumerism*. Horkheimer and Adorno (1944/2002, Chapter IV) coined the concept of *culture industry*, later brilliantly elaborated further by Adorno alone (1975). The culture industry does not really produce products, but it does work (metaphorically) like Ford's assembly line in producing subjects, that is, consumers. This was seen as a logical manoeuvre by the capitalist system in trying to cover new areas

of life and gain higher profits. For example, replacing the traditional “high culture” with its opposing “popular culture” was seen as the elite’s successful strategy for keeping the producing middle class and proletariat in their own role outside capitalist wealth generation. Popular culture, entertainment industry, and consumerism – all propagated by the emergent mass media and the technological innovations enabled by positivistic science – made the masses ignorant, unaware of their rights and unwilling to be politically active citizens, thereby favoring contemporary power-relations (Benjamin Nealon & Caren, 2002; Peltonen, 2010). Horkheimer and Adorno (1944/2002, p. 95–96) drew a straight line from the culture industry to technology and domination:

Films and radio no longer need to present themselves as art. The truth that they are nothing but business is used as an ideology to legitimize the trash they intentionally produce... Technical rationality today is the rationality of domination. Automobiles, bombs, and films hold the totality together until their levelling element demonstrates its power against the very system of injustice is served. For the present the technology of the culture industry confines itself to standardization and mass production and sacrifices what once distinguished the logic of the work from that of society. These adverse effects, however, should not be attributed to the internal laws of technology itself but to its function within the economy today... [Radio] democratically makes everyone equally into listeners, in order to expose them in authoritarian fashion to the same programs put out by different stations.

In a similar manner, their Frankfurt School colleague Fromm (1956/2002, p. 107) states the following:

Men work together... they work together, according to a rhythm measured by the experts, with methods worked out by the experts... they read the same newspapers, they listen to the radio, they see the movies, the same for those on the top and for those at the bottom of the ladder, for the intelligent and the stupid, for the educated and the uneducated. Produce, consume, enjoy together, in step, without asking questions. That is the rhythm of their lives.

And continues (p. 107) by answering to the rhetorical question of what does 20th-century capitalist society need:

It needs men who co-operate smoothly in large groups; who want to consume more and more, and whose tastes are standardized and can be easily influenced and anticipated. It needs men who feel free and independent, not subject to any authority, or principle, or conscience – yet willing to be commanded, to do what is expected, to fit into the social machine without friction.

The three citations above indicate how the Frankfurt School viewed the orchestration of capitalist hegemony in the post-war West. Technology, media, education, science, popular culture – they all began to systematically pursue a one-sided ideological agenda that created a false consciousness for the standardized masses and kept them unaware of truly alternative ways of living.

Worth mentioning is that it is specifically this “standardization” of people that Adorno in particular defines as “ideology.” Hence, for Adorno (1973, 1991) ideology does not primarily oppose theory or truth of some kind but rather heterogeneity or difference. He considers the culture industry as the most powerful tool for standardizing and homogenizing people into controllable and passive units, because traditional art speaks up for the nonidentical and differential. Similarly, Adorno believes that standardization also works in “healing” people from the psychological anxiety that alienation and intensified capitalism have created (e.g., through breaking down the extended family unit, increasing economic reliance, etc.). However, this standardization is not only embodied in soap operas and TV news but also in education, health care, insurance policies, and even trends in home decoration. Adorno (1973, p. 182) reinforces these claims by stating how national and international laws also serve the same standardizing agenda effectively:

The entire juridical realm is one of definitions. Its systematic commands, that nothing shall pass into it, which could escape from its closed circle, *quod non est in actis* [Latin: which is not in the deed]. This enclosure, ideological in itself, exerts real violence through the sanctions of law as the socially controlling authority, particularly in the administrated world.

The Frankfurt School scholars conveyed this *kulturkritik* throughout the superstructures of capitalism and, in addition to the positivistic science, technology, art, and the legal systems, also the family unit, modes of rationality, language, literature, music, psychoanalysis, authoritarian personality, and bureaucracy were all under severe scholarly attack (Burrell & Morgan, 1979). However, in the 1930s the early Frankfurt School gained attention and built its identity particularly by openly targeting much of their critique at fascism and the rising nationalistic movement in Germany. In the following rather lengthy but very important citation, Horkheimer (1975, pp. 210–211) argues that Critical Theory is the opposite of both bourgeois individualism and nationalistic collectivism:

Bourgeois thought is essentially abstract, and its principle is an individuality which inflatedly believes itself to be the ground of the world or even to be the world without qualification, an individuality separated off from events. The direct contrary of such an outlook is the attitude which holds the individual to be the un-problematic expression of an already constituted society; an example would be a nationalist ideology. ... Critical thought and its theory are opposed to both the types of thinking just described. Critical thinking is the function neither of the isolated individual nor of a sum-total of individuals. Its subject is rather a definite individual in his real relation to other individuals and groups, in his conflict with a particular class, and, finally, in the resultant web of relationships with the social totality and with nature. The subject is no mathematical point like the ego of bourgeois philosophy; his activity is the construction of the social present. Furthermore, the thinking subject is not the place where knowledge and object coincide, nor consequently the starting-point for attaining absolute knowledge. Such an illusion about the thinking subject, under which idealism has lived since Descartes, is ideology in the strict sense, for in it the limited freedom of the bourgeois individual puts on the illusory form of perfect freedom and autonomy.

Although the antidemocratic, anti-Jewish, and anti-Marxist Nazi regime forced the Frankfurt School to flee first to France and then to United States, the critique remained strong and persisted in the future as well (Magala, 2006). Critical Theorists

kept on identifying and challenging assumptions behind “ordinary” ways of conceiving and acting, and accentuating the importance of recognizing the effect of culture, history, and social positioning on beliefs and actions. Imagining and exploring extraordinary alternatives, ones that can challenge the established orders, remained crucial in line with being sceptical about any knowledge or solution that claims to be the only way of seeing or perceiving any given situation (Alvesson & Deetz, 2000). Consequently, I find it justifiable to argue that the Frankfurt School critique and its premises are not necessarily attached to any specific time or place. The Nazi regime and other dictatorships of the era gradually collapsed, but “our time” – also in the Western part of the world – has its own explicit or implicit ideological beliefs, and whether they refer to “the end of history” (Fukuyama, 1992), “the clash of civilisations” (Huntington, 1996), the much-feared global terrorism and ecological disasters, or, in a less radical scale, modern MNCs and their often unquestioned HRM practices, they are all valid targets for *ideology critique*.

## 1.7. Outlining Critical Theory from Horkheimer to Habermas

---

In the 1940s, Horkheimer and Adorno started a “phase of particularly intensive collaboration” (Horkheimer & Adorno, 1944/2002, p. 229) as they had both settled in New York. In addition to “the culture industry,” they began to elaborate another pivotal concept of *instrumental reason*, which cannot be disregarded when thinking about the *ideology critique* in a wide sense or when narrowing the focus to organizational life. Their attitude toward the instrumentality of reason is radically critical and, as will be seen in the chapter on the critique of Critical Theory, this criticalness does not save the Enlightenment project with its evident pitfalls.

For Horkheimer and Adorno (1944/2002, 1947), instrumental reason is closely linked with science and particularly its positivistic side, just as the culture industry is, and through it those in power can efficiently dominate social institutions and nature. Initially, the instrumentality of reason arose from the objectifying and instrumentalizing tendency of the Enlightenment, because of which the nature around us in particular was seen merely as raw

material that was to be worked upon (scientifically) for human ends in a utilitarian manner. Positivistic science had gradually created a logic according to which a cow, for instance, is not seen primarily as an animal with unique features and inherent natural value but rather as an objective part of an industrial, possibly unsustainable, food supply, which exists to feed the growing and meat-loving human population. Moreover, it is essential to understand that such instrumentality is far from being a synonym for plain rationality or plain reason. Instrumental reason is the ability and preference to use available resources in pursuing desired goals, but it does not touch upon or challenge the attached value systems. In other words, it is not relevant to ponder whether the values around the process of reaching the goals are in themselves rational when the knowledge we create can be “value-neutral.” Consequently, instrumental reason equates knowledge with functional and narrow problem solving; knowledge is a scientific and formal means to an end, and hence it can be *detached* from everyday human existence. Not surprisingly, one could argue that instrumental reason shares a lot of similarities with Marx’s commodity fetishism, although Marx blames the capitalist production modes whereas Horkheimer and Adorno find fault with a specific type of science and the Enlightenment project (Craib, 1992; Horkheimer & Adorno, 1944/2002, 1947; Prasad, 2005).

I find the relationship between instrumental reason and modern organizations rather straightforward. As a matter of fact, Horkheimer and Adorno (1944/2002) make it clear that the instrumentality of reason causes an exploitative tendency not only toward the natural world. There are also humane and social dangers hidden within its hegemony because human relationships are eventually also evaluated in instrumental fashion. Without doubt, instrumental reason is *calculative* in nature, and it can destroy an individual’s sense of self-worth as people are evaluated and appreciated through measurable and material accomplishments instead of, for example, immeasurable and abstract personality traits and emotional intelligence. Horkheimer and Adorno (1944/2002, pp. 21–22) encapsulate it as follows:

Individuals define themselves now only as things, statistical elements, successes or failures. Their criterion is self-preservation, successful or unsuccessful adaptation to the objectivity of their function and the schemata assigned to it.

The statement is supplemented by Fromm (1956/2002, p. 143) as follows:

[The] love of exchange has replaced the love of possession. One buys a car, or a house, intending to sell it at the first opportunity. But more important is the fact that the drive for exchange operates in the realm of interpersonal relations. Love is often nothing but a favourable exchange between two people who get the most of what they can expect, considering their value on the personality market. Each person is a “package” in which several aspects of his exchange value are blended into one: his “personality,” by which is meant those qualities which make him a good salesman of himself; his looks, income, and chance for success.

Since the mid-20th century, the situation that Horkheimer, Adorno, and Fromm described has culminated in many ways, particularly during times of economic recession. On a macro level, we constantly and consistently speak about efficiency, employment, growth, human resources, gross domestic product, and so on. Voice is given to those in power, that is, politicians and selected “specialists.” They instrumentally conceptualize our societies as economic abstractions that have to be evaluated and steered objectively (as the example words above allude), as if there were no real lived and subjective experience attached to them (e.g., the poverty, misery, and social injustice experienced by the unemployed). Similarly, due to the dominating view on rationality, also in management and organization studies some subjective topics, such as those relating to emotions and affect, have “generally tended to be marginalized” (Thompson & Willmott, 2016, p. 485). On the individual level, the discussion even today can largely circulate around salary, social position, job, promotion, and so on. Hence, it can be argued that in an instrumental manner we are beginning to treat the economic growth as the main – if not the only – barometer for measuring the value of our societies, cultures, and us as individuals in them. If Horkheimer and Adorno were still alive, I believe they would argue, among many other things, that HRM or corporate social responsibility (CSR) are archetypical examples of practical moves by organizations that re-embed the profit-driven instrumental reason into new contexts (e.g., in terms of employee health and wellbeing or nature protection) thereby saturating a great deal of our life with instrumental reason.

As societies became saturated with instrumental reason that mainly served those in power, it was specifically Critical Theory and its *ideology critique* that came to provide alternative knowledge and therefore emancipate the silenced and misled individuals. Among the Frankfurt School scholars, it was Habermas (1972, 1973) who proposed that knowledge development is deeply grounded in human nature, making him subsequently classify science into three types, thus illuminating the interest-exposing and truth-revealing roles of knowledge. For Habermas, instrumental knowledge is one of the three types, and it refers to the way one manipulates and controls one's environment. As discussed above, such instrumental knowledge is technical in nature and based on causal explanations and hypothetical–deductive theories provided by empirical–analytic positivistic science. It has been argued (Ahonen, 2001, p. 158) that such instrumental knowledge is an *indispensable part* of profit maximizing capitalism, and, in order to prevent or dilute criticism and conflict, instrumental–technological rationality requires an ideologically strong basis. The second type is “practical knowledge,” which is largely based on hermeneutic methods as applied in the interpretive social sciences, which see social knowledge as disposed by consensual norms that craft intersubjective understanding and defines reciprocal behavioral expectations between individuals.

The third type is then “emancipatory knowledge,” which Critical Theory and its *ideology critique* represent together with, for example, feminist theories or psychoanalysis. Emancipatory sciences believe that through critical self-reflection it is possible not only to free science from its positivistic illusions, but most of all, liberate individuals from domination. In other words, it is of emancipatory interests to increase the influence and autonomy of exploited groups, such as the people situated low in the societal hierarchy. However, Habermas was also well aware of the weaknesses embedded in the emancipatory type of knowledge and emancipatory science (e.g., his own critique of positivism did not concretely unmask any real cases of social-political ideology or personal self-deception, as a Marxist or Freudian critique should essentially do), as it was still unable to pass a concrete and practically participative and democratic test. Habermas' frustration about the lack of *concrete and practically significant* emancipatory theories made him famously argue as follows: even today “in Enlightenment there are only participants” (Habermas, 1973, p. 44). In order to overcome such deficits and to create

a more concrete foundation for emancipatory science, he later created his *theory of communicative action* (1984; 1987).

However, before elucidating the theory of communicative action, between Horkheimer and Adorno, whose influence was great in the 1940s and 1950s, and Habermas, who flourished especially in the 1970s and 1980s, there was Herbert Marcuse (1898–1979), whose ideas of *cultural one-dimensionality* broke new ground for Critical Theory. Although the Frankfurt School had already gained recognition in the first half of the century, it was not until the student riots of the 1960s that members of the Frankfurt School members gained “practical significance and wider recognition” (Scherer, 2009, p. 32), largely because of Marcuse’s magnum opus *One-Dimensional Man: Studies in the Ideology of Advanced Industrial Society* (1964).

Marcuse’s (1964) cultural one-dimensionality owes a lot to Horkheimer and Adorno’s discussions on cultural industry, instrumental reason, and the ideological tendency of modern industrial capitalism to suppress alternative modes of reason and thought, causing alienation of the individual at many levels. Marcuse’s argument below points out that instrumentality and technological advancement have made subjective clashes between society and its individuals practically impossible, and therefore domination over the individual has reached new forms under industrial capitalism:

The defence structure [of modern society] makes life easier for a greater number of people and extends man’s mastery over nature. Under these circumstances, our mass media have little difficulty in selling particular interests as those of all sensible men. The political needs of society have become individual needs and aspirations, their satisfaction promotes business and the commonweal, and the whole appeals to be the very embodiment of Reason... The capabilities (intellectual and material) of contemporary society are immeasurably greater than ever before – which means that the scope of society’s domination over the individual is immeasurably greater than ever before. Our society distinguishes itself by conquering the centrifugal social forces with Technology rather than Terror, on the dual basis of an overwhelming efficiency and increased standard of living. (Marcuse, 1964, p. 7)

Furthermore, division between social classes was vanishing in a similar manner, although in reality exploitation and injustice were in fact intensifying, according to Marcuse. The following long but essential citation shows how evanescence of the class division between the working and middle classes all over the industrial world was seen as an ideological victory for capitalism over Marxism, as the necessity of class division is a salient building block for much of Marxist theory.

A brief comparison between the formative stage of the theory of industrial society and its present situation may help to show how the basis of the critique has been altered. At its origins in the first half of the nineteenth century, when it elaborated the first concepts of the alternatives, the critique of industrial society attained concreteness in a historical mediation between theory and practice, values and facts, needs and goals. This historical mediation occurred in the consciousness and in the political action of the two great classes which faced each other in the society: the bourgeoisie and the proletariat. In the "Capitalist world, they are still the basic classes. However, the capitalist development has altered the structure and function of these two classes in such a way that they no longer appear to be agents of historical transformation. An overriding interest in the preservation and improvement of the institutional status quo unites the former antagonists in the most advanced areas of contemporary society. And to the degree to which technical progress assures the growth and cohesion of communist society, the very idea of qualitative change recedes before the realistic notions of a non-explosive evolution. In the absence of demonstrable agents and agencies of social change, the critique is thus thrown back to a high level of abstraction. There is no ground on which theory and practice, thought and action meet. Even the most empirical analysis of historical alternatives appears to be unrealistic speculation and commitment to them a matter of personal (or group) preference. (Marcuse, 1964, p. 9)

Marcuse's argument above regarding the impossibility that individuals could think about realistic alternatives to capitalism – not to mention acting according to them – was later encapsulated by another Marxist philosopher, Slavoj Žižek, who has famously stated in his documentary film "Žižek!" that: "it's much easier to

imagine the end of all life on earth than a much more modest radical change in capitalism.” Marcuse argues that on a societal level increased material living standards made people sufficiently (though falsely) satisfied, created a feeling that their (false) needs were being met adequately, and provided a reasonable sense of personal security. Taken together, these factors smothered their revolutionary will and potential. The following practical example illustrates how in Marcuse’s (1964, pp. 159–160) view, people will nevertheless feel empty if their “false” needs rather than their “true” needs are met:

I ride in a new automobile. I experience its beauty, shininess, power, convenience – but then I become aware of the fact that in a relatively short time it will deteriorate and need repair; that its beauty and surface are cheap, its power unnecessary, its size idiotic; and that I will not find a parking place. I come to think of my car as a product of one of the Big Three automobile corporations. The latter determine the appearance of my car and make its beauty as well as its cheapness, its power as well as its shakiness, its working as well as its obsolescence. In a way, I feel cheated. I believe that the car is not what it could be, that better cars could be made for less money. But the other guy has to live, too. Wages and taxes are too high; turnover is necessary; we have it much better than before. The tension between appearance and reality melts away and both merge in one rather pleasant feeling.

Naturally, the material artifact that causes mixed feelings of being “cheated,” but for a necessary cause, does not have to be an automobile, and I believe most of us, as consumers, have felt similar tension and anxiety in our everyday lives.

Moreover, when the mass media provided the growing Western middle classes with a picture of the “alternative” in the form of the totalitarian horror regimes of the East (namely in the USSR and China) operating in the name of “Marxism” (and becoming increasingly embarrassing for Frankfurt School scholars), Marcuse needed the concept of one-dimensionality to elucidate why Marxism seemed to be alive only in 19th-century thought, and why people living under industrial capitalism could not see or oppose their own exploited position.

According to Marcuse (1964), modern industrial capitalism creates consumerist false needs that the mass media and

entertainment effectively transmit, resulting in one-dimensional behavior and thought that “passivizes” the individual, hence reducing him into a noncritical tool in the capitalist production system. Simultaneously, the prevailing philosophy of positivism has turned the natural world into a world defined by modern technology where subjective experiences and emotions are subordinated to completely technical matters, reminding us of instrumental rationality. Consequently, the two dimensions of subjective and objective have merged into a single objective dimension.

As can be anticipated, Marcuse (1964) is highly critical of consumerism, possibly even more so than Fromm (1956) and sees it as an essential element in sustaining such one-dimensionality. Marcuse contends that consumerism, precisely like technology, plays a strong role in creating a perception of democracy and freedom, although it really upholds authoritarian “*unfreedom*.” One reason for this is that people purchasing products assume that the products are fundamentally different, although in reality they are differentiated minimally and only superficially through cogent mass marketing. Most importantly, these products are placed on the markets by a fairly few people who have the power to select and define the alternatives provided – and what they represent. However, to my mind it is to some extent difficult to digest the exceptionally strong normativity in Marcuse’s arguments and beliefs and his underestimation of the intellect of an individual living in an advanced Western society. Even though after the student uprisings of the late 1960s his tone softened slightly (see Marcuse, 1970), Marcuse remained straightforward and adamant in his normative ideals about true “human needs” and how they at least cannot be met:

Above the animal level even the necessities of life in a free and rational society will be other than those produced in and for an irrational and unfree society. (Marcuse, 1964, p. 169)

Consumers behave irrationally as they are taught to believe that one can buy happiness – an aspect that Marcuse (1964) finds psychologically, socially and ecologically damaging – which makes them work more than required to fulfill their true basic needs. Consumers work to buy more material, to replace the old with what would still do, and gradually search for social status through material items – and the images attached to them – hence losing part of their humanity. One now dreams of

gaining a solid full-time job in a major company, characterized by strong bureaucracy, and spending after-work leisure as a mechanical consumer of largely useless or otherwise unnecessary products, and mass entertainment, unaware of his own unjust position caused by an illusion of autonomy and freedom. Moreover, as Peltonen (2010, p. 166, 2016) points out, the mass media and the political discussion it “opens to the public” gives the impression that the old elite circles are caving in, although in reality the opening of public discussion has not altered the underlying societal power relations. Nevertheless, although people can inherently sense their alienation, the social control of one-dimensionality makes them feel unable to influence their lives and destinies. Apathy and depression are the result.

All in all, it is not difficult to comprehend why Marcuse’s ideas are essential for outlining a critique of ideology and providing even more elaborate explanations for the invisible features in ideological domination. Moreover, in an organizational context, I believe that his initial attempts to achieve emancipation are apparent in his view (see also Marcuse, 1955) of individuals acting unconsciously according to their socioeconomic class location, rather than being rational and sovereign beings. Among management historians, Jacoby (2004, p. 208) argues that just as the class division began to disappear on a societal level, hence depriving the masses of revolutionary potential, the line between white- and blue-collar workers on an organizational level began to “blur permanently” in the 1950s. Hence, the seed of emancipation could be making employees aware of their exploitation, despite a lower corporate hierarchy that can make them imagine a state of equality. In addition, in a manner similar to Marcuse’s use of “surplus repression” to explain the existence of a buffer zone in modern capitalism that exercises more control than would be functionally necessary, Fleming (2014a, p. 37) uses “surplus regulation” to explain the practically limitless standardization and surveillance of employees practiced by 21st-century corporations and their HR functions.

Although Jürgen Habermas (b. 1929) is possibly the most important Frankfurt School scholar for the birth of CMS (Alvesson et al., 2009; Alvesson & Deetz, 2000; Alvesson & Willmott, 1992), he has also been considered one of the most impactful sociologists and philosophers of post-war Europe, particularly after his two-part theory of communicative action (1984, 1987a) was published (e.g., Bernstein, 1987). However, even before the theory of communicative action, Habermas was

considered one of the most important contributors to the conceptualization of ideology and the development of emancipatory social research (Burrell & Morgan, 1979; Giddens, 1979; McCarthy, 1978). Furthermore, it is worth mentioning that Habermas has created numerous meaningful theories that have been pivotal in critical organizational studies outside the management subdiscipline (see, e.g., Shivastava, 1986 and Alvesson & Willmott, 1995 in strategy research, Scherer & Palazzo, 2007 in CSR research, Power & Laughlin, 1992 in accounting, Burrell's, 1994 summary of Habermas's contribution to organizational analysis in general or Forester, 2003 on the use of Habermas in methodologically developing organization studies).

Habermas has analyzed the nature of the Enlightenment and Modernity project as cultural rationalization that poses both threats and opportunities. Particularly in *The Philosophical Discourse of Modernity* (1985) as well as in both volumes of *The Theory of Communicative Action* (1984, 1987a), it becomes obvious that Habermas owes a lot in his thought to Weber's notions of rationalization. However, Habermas treats Weber in much the same way that Marx treated Hegel and argues that one must go beyond Weber in conceptualizing rationalization and that this can be done by distinguishing between *instrumental rationality* (as discussed before), which is associated with the system world, and *communicative rationality*, which is associated with the *lifeworld*.

To start with, Habermas (1984) argues that to be human is to communicate, and "a species that depends for its survival on the structures of linguistic communication and cooperative, purposive-rational action must of *necessity* rely on reason" (Habermas, as cited in Eagleton, 1991, pp. 131–132). Hence, communication based on rationality and reason is the key to emancipation. However, our lifeworld has been "colonialized" by ideologies that now dominate our communication and thereby our consciousness. Habermas (1987a, p. 356) skillfully attaches himself to his Frankfurt School predecessors by highlighting that our lifeworlds become colonialized when (1) traditional forms of life are dismantled; (2) social roles are sufficiently differentiated; (3) there are adequate rewards of leisure and money for alienated labor; (4) dreams and hopes become individualized by state canalization of culture and welfare, and all this is institutionalized into the very structures of our societies.

Furthermore, Habermas is generally critical of instrumental rationality (he also speaks about "functionalist" rationality in the

manner of Burrell & Morgan, 1979) and in his own works wants to contribute particularly to communicative rationality, which places rationality densely into the structures of linguistic interpersonal communication. However, although Habermas places communicative rationality above instrumental rationality, he argues (1987a, p. 118) that we should nevertheless simultaneously conceive of “societies as systems and lifeworlds,” because lifeworld alone has a “limited analytical and empirical range” and system world and instrumental rationality are also necessary to understand and use in generating knowledge.

For Habermas (1984), creation and re-creation of differing meaning patterns for the lifeworld enable a larger conception of rationality. The lifeworld is rational only if it allows interaction steered by consensus-driven, communicatively achieved understanding, rather than by instrumental means such as financial wealth and formal power or by unreflective forms of cultural values based on myths and traditions. Consensus and rationality are indeed cornerstones for Habermas in reaching communicative understanding, although the notion of equality between all the parties involved is a similarly important normative assumption. Moreover, communicatively achieved understanding also requires open discussion based on human benevolence, dialogue and argumentation, and on each individual’s critical self-reflection:

In communicative action, the very outcome of interaction is even made to depend on whether the participants can come to an agreement among themselves on an intersubjectively valid appraisal of their relations to the world. On this model of action, an interaction can succeed only if those involved arrive at a consensus among themselves, a consensus that depends on yes/no responses to claims potentially based on grounds. (Habermas, 1984, p. 106)

However, above everything else, it is *undistorted communication* that enables communicatively achieved understanding. As discussed before in this study when defining the concept of “ideology,” for Habermas it is distorted communication that stands for ideology, and he perceives communication distorted if any of the four validity claims is not present (i.e., communication has to be mutually intelligible, propositionally true, each contributor has the right to speak the way as he does, and everyone acts sincerely). Consequently, if all the validity claims are present, there is a basis for communicative rationality, which is the most

reflective form of rationality because it is not ideology, power, manipulation, status, misunderstanding, fear, or any other form of distortion, that impacts the evolution of new ideas. Hence, it is the best, well-grounded arguments, presented in an open forum, which craft the basis of decision-making rather than, for example, the exclusion of participants, ideology, tradition, or authority (Habermas, 1984, 1987a). In the following citation, Habermas neatly encapsulates the core of his communicative rationality, which requires that people are essentially benevolent, rational, and collaborative beings.

The concept of communicative rationality carries with it connotations based ultimately on the central experience of the unconstrained, unifying, consensus-bringing force of argumentative speech, in which different participants overcome their merely subjective views and, owing to the mutuality of rationality motivated conviction, assure themselves of both the unity of the objective world and the inter-subjectivity of their lifeworlds. (Habermas, 1984, p. 10)

On a societal level, without distorted communication we can reach a state of “ideal speech community” (also referred to as the “ideal communicative community”). This community is an indispensable part of modern, just, and civilized society, because in it all individuals can participate equally in a rational conversation, and there is no manipulation or coercion causing self-deception or hidden motives affecting the communication process. Habermas resolutely advocates an ideal speech community for every single communicative situation. In an organizational setting, this could refer to, for instance, performance appraisal interviews, board meetings, or negotiations between corporations and labor unions. Hence, I argue that particularly for HR research and practice, Habermas’s ideas can be highly applicable and useful.

Furthermore, when speaking of distorted communication, Habermas (1984) accentuates the difference between distorted communication (for example caused by interpersonal misunderstanding and confusion or simply by an inadequate presentation of thought) and *systematically* distorted communication. To my mind, Habermas unfortunately tends to move on a level of high abstraction and does not provide a coherent and easily digestible definition of “systematically” (also, I completely agree with Giddens (1987, p. 96) that Habermas’s theory of communicative

action is “sprawling,” “uneven,” and most of all, an “unnecessary long” work). Nonetheless, as a distinguished secondary source, Eagleton (1991, p. 129) makes the point crystal clear:

If a communicative structure is systematically distorted, then it will tend to present the appearance of normativity and justness. A distortion which is so pervasive tends to cancel all the way through and disappear from sight – just as we would not describe as a deviation or disability a condition in which everybody limbed or dropped their aitches all the time. A systematically deformed network of communication thus tends to conceal or eradicate the very norms by which it might be judged to be deformed, and so becomes peculiarly invulnerable to critique. In this situation, it becomes impossible to raise within the network the question of its own workings or conditions of possibility, since it has, so to speak, confiscated these enquiries from the outset. The system’s historical conditions of possibility are redefined by the system itself, thus evaporating into it. In the case of “successful” ideology, it is not as though one body of ideas is perceived to be more powerful, legitimate or persuasive than another, but that the very grounds for choosing rationally between them have been deftly removed, so that it becomes impossible to think or desire outside the terms of the system itself.

In other words, if communication is mediated by power relations, attached to the materiality of institutional and social practices and strategically excludes alternative discourses, it is systematically distorted and hence stands for ideology (Deetz, 1992a; Duberley & Johnson, 2009; Prasad, 2005). Such distortion can take place in every domain of our societies, and Alvesson (1991) accentuates how for example academics – and especially business scholars – are consistently victims of distorted communication. In an organizational setting, systematically distorted communication most typically takes place through “discursive closure” (e.g., Alvesson & Deetz, 2000; Alvesson & Willmott, 2003; Deetz, 1992a) as “a way of shutting down opposing views, thwarting public explorations of controversy, and inhibiting genuine dialogue without giving the appearance of doing so” (Prasad, 2005, p. 148). It is not difficult to come up with examples where discursive closure takes place in the public of private spheres of our lives, albeit the most “successful”

closures are, indeed, hidden very thoroughly within everyday communication. To my mind, such discursive closure resembles the *hegemony* outlined by Gramsci in many ways, and both of them can take place in the form of an authority establishing “facts” or appealing to norms of legitimacy.

It is evident that Habermas believes, in line with other Critical Theorists, that an individual can be autonomous and emancipated from the mental chains created by false-consciousness, and language and communication with its distortions. Moreover, Habermas’s thoughts are also loyal to the traditional *ideology critique* in the sense that he distinctly wants to shed light on those aspects of everyday life that in one way or another constrain social ideas and behavior. However, although the previous Frankfurt School scholars themselves wanted to ground social action in reason, it can be argued that none of them were as concrete as Habermas in providing procedural ideas for achieving emancipation (Alvesson & Deetz, 2000). Nevertheless, many of Habermas’s ideas, including the theory of communicative action, have been the subject of scholarly criticism. For example, Luhmann (1982, 1995) questions whether discursive action could be a pivotal medium for modern-day social interaction or moral-bound communicative rationality impact or defeat the money-driven rationality of strategic political and economic action. Many others (e.g., Elster, 1986) say that the theory of communicative action – with its “ideal speech community” – is in any case too idealistic and utopian for any real political institutions. Deetz (1992a) wonders about the overemphasis on rationality and the appreciation of interpersonal consensus. In general, Habermas’s view of humans as essentially benevolent and gracious beings is an easy target for his opponents.

Lastly, as will be more thoroughly elaborated in the final chapter of the literature review, which takes up critique of Critical Theory, postmodernist/poststructuralist scholars such as Foucault (1980) deny Habermas’s assumption of a state in which a well-intentioned social participator could exist in a vacuum of power and ideology. To some extent, Foucault and other like-minded thinkers reject the whole idea of concrete boundaries and categorical distinctions, for example in the form of class, dialects, political economy, socialism, and emancipation (Best & Kellner, 1991). Foucault’s ideas provide a sharp critique of Habermas’s belief that theory can mirror a reality of some kind. The former takes a relativist position that enables theories to provide only minor, if any, perspectives on their objects.

In the context of organization studies, the differences between postmodernists/poststructuralists like Foucault and modernists like Habermas have been neatly elucidated by Clegg (1990, p. 181), who states that while a modernist organization is rigid, a postmodern is flexible; modernist consumption is steered toward mass forms, while postmodernist is premised on niches; a modernist organization is built upon technological determinism, whereas a postmodernist relies on technological choices; modernist organizations provide jobs that are highly differentiated, de-skilled, and demarcated, whereas postmodern jobs are de-differentiated, multiskilled, and de-demarcated. Hence, not surprisingly, it has been argued within organization studies (Burrell, 1994) that scholars citing Habermas and Foucault are in partial opposition to each other, but due to their distinct epistemological and ontological similarities, as well as sympathy toward the young Marx (Poster, 1984), they can nevertheless be placed within the same research paradigm. Together, they have been the leading intellects in the birth of Critical Management Studies (Alvesson et al., 2009; Alvesson & Willmott, 1992; Jones, 2009).

In addition, when it comes to HRM within CMS, the contribution of Foucault in particular cannot be underestimated (e.g., Alvesson & Willmott, 2003; Legge, 1995; Townley, 1993, 1994), and thus I have added below a chapter introducing a few selected concepts and ideas of Foucault, although he may not fit into the very strictest framework of Critical Theory and neither are the selected concepts fundamental building blocks in Giddens's (1979) supplemented framework. The concepts introduced are *panopticon*, *technique of the self*, and *genealogy*. In addition, I will present brief discussions of Foucault's ideas on *language*, *power*, and *subjectivity* as these ideas have made a prominent contribution to management and organization studies (Kelemen & Peltonen, 1998).

## 1.8. Foucault Enriches the Frankfurt School Thought

---

Michel Foucault's (1926–1984) writings have generally been divided into an archaeological phase and a genealogical period (Best & Kellner, 1991), although other scholars have also included aesthetic and ethical phases (e.g., Allen, 2000;

Knights, 2002) and governmentality (Välikangas & Seeck, 2011). Although Foucault's phases differ in their focus and methods, all his works leave room for interpretations by readers and are therefore applicable for scholars across research fields, including management and organization studies (Knights & Willmott, 1999).

In Foucault's first phase, the archeological phase, Foucault (e.g., 1972, 1973, 1988b, 2002) paid attention particularly to how the authorities craft "regimes of truth" that set limits for individuals regarding how they understand themselves, just as they guide and enable scientists in creating knowledge that favors those in power and cultural rules that, for instance, turn selected statements of things (e.g., "rationality" or "madness") possible and eventually taken for granted. Moreover, in *The Archaeology of Knowledge* (1972), Foucault interestingly and concretely demonstrates how language itself – that is, the words we have to describe and conceptualize the world around us – has been influenced by those in power throughout history. Hence, the history that determines us today plays rather with "relations of power, not relations of meaning" (Foucault, 1980, p. 114), as power is always present in meaning.

Foucault (1972) mentions the word "prince" as one of his examples and demonstrates how in different civilizations different connotations are associated with the word (e.g., through stories, history books, and declarations) thus creating a systematic pattern over time and having an impact on present day people without them realizing it. One could see this as an argument against the Frankfurt School scholars (not to mention Marx himself), because it is not only the twisted communication and ideology that subjugate the people but also the concrete words used in communication. For instance, the commonly used concept "proletariat" is far from being unproblematic and neutral in describing a selected group of people. "Proletariat" did not arise from nothing; it is a human-made concept of an object that requires a set of linguistic practices, a group of people to which these can apply, and an understanding of "non-proletariat." Hence, "proletariat" is nothing isolated, static, or objective, and the substance of proletariat cannot be found by looking at the features of the object (e.g., a proletarian person), but at the set of relational systems and linguistic history that make the concept possible. Consequently, Foucault could argue that Marx, some of the Critical Theorists and most of the organization theorists have looked mistakenly at the features of the object and the

implicit/explicit relational systems *in* the world, instead of at the human understanding *of* the world.

Foucault’s genealogical phase (particularly Foucault, 1977, 1988a) has been by far his most cited phase in organization studies (see a table by Välikangas & Seeck, 2011, p. 822). This is possibly because he then focused on knowledge and particularly *power*, with the interesting assumption that we are not progressing and advancing from barbarism to civilization, a fundamental assumption of the Enlightenment project, but rather always moving from one form of domination to another. In his *Discipline and Punish* (1977), Foucault demonstrates in detail how after the 18th century the power of the European monarchs and other authorities was gradually transformed from “sovereign” methods to “disciplinary” methods. Sovereign power was exercised through horrifying physical punishments that spread awe and fear among the citizens, whereas disciplinary power became more humane, just and less arbitrary as it was exercised through social institutions such as law courts and prisons.

What makes this particularly interesting for organization scholars is that disciplinary power is deeply rooted in bureaucratic and impersonal procedures and in the solidly articulated rules and clauses according to which one should behave. Combining such clear formal requirements for suitable behavior with constant, multifaceted but obscure *surveillance*, Foucault brilliantly manages to elucidate how disciplinary power is a powerful means of achieving social control. Moreover, this social control is easily applied throughout society via differing social institutions. Foucault (1977, p. 228) mentions how modern “factories, schools, barracks, hospitals” all resemble prisons as each of them involves hierarchical observation, normalizing judgments and examination as technologies of a proper form of surveillance, discipline, and training. With these technologies, people are graded through hierarchy and rendered to resemble each other as they feel constant pressure to conform to the same model. In the following citation, Foucault (1977, p. 143) elucidates the goals of disciplinary power and surveillance:

Avoid distributions in groups; break up collective dispositions; analyse confused, massive or transient pluralities. Disciplinary space tends to be divided into as many sections as there are bodies or elements to be distributed. One must eliminate the effects of imprecise distributions, the uncontrolled disappearance of individuals, their

diffuse circulation, their unusable and dangerous coagulation... Its aim was to establish presences and absences, to know where and how to locate individuals, to set up useful communications, to interrupt others, to be able at each moment to supervise the conduct of each individual, to assess it, to judge it, to calculate its qualities or merits. It was a procedure, therefore, aimed at knowing, mastering and using.

Foucault (1977) uses the concept *panopticon*. It was originally the name proposed in the late 18th century by utilitarian social scientist Jeremy Bentham for the design of a prison where the prisoners could not see which or how many, if any, guards were observing them at any given moment. Foucault uses panopticon to illustrate a similar surveillance system, in prison or outside of it, in which the person under surveillance can never be sure if he is really under surveillance, but in any case behaves as expected, by exercising *self-surveillance*:

[T]his invisibility [of surveillance in Panopticon] is a guarantee of order. If the inmates are convicts, there is no danger of a plot, an attempt at collective escape, the planning of new crimes for the future, bad reciprocal influences; if they are patients, there is no danger of contagion; if they are madmen there is no risk of them committing violence upon one another; if they are schoolchildren, there is no copying, no noise, no theft, no waste of time; if they are workers, there are no disorders, no theft, no coalitions, none of those distractions that slow down the rate of work, make it less perfect or cause accidents. The crowd, a compact mass, a locus of multiple exchanges, individualities merging together, a collective effect, is abolished and replaced by a collection of separated individualities... Hence the major effect of the Panopticon: to induce in the inmate a state of conscious and permanent visibility that assures the automatic functioning of power (Foucault, 1977, pp. 200–201)

Consequently, Panopticon is a system that is “economical in material, personnel and time, in the sense that it reduces the number of those who operate it, whilst increasing the number on whom it is exercised” (Townley, 1994, p. 138). Hence, disciplinary power can be referred to as “panopticism”; power is not located in a person but in the constant practices of hierarchy,

observation, surveillance, and writing (Foucault, 1977). For Foucaultian organization scholars, it did not require much to realize how modern corporations have also managed to automate and disindividualize power and employee control through panopticism, just as they have managed to define and institutionalize the idea of “normal,” thereby marginalizing the incompetent, and differentiating the “good” from the “bad” within organizational actions (Knights, 2009; Prasad, 2005). Furthermore, in organizations it is particularly in the seemingly mundane and innocuous HRM practices and techniques that panopticism is constantly present in the form of measurement and categorization of behavior, tasks, and interactions (Townley, 1993, 1994; Watson, 2007). Hence, I find panopticism an important element in understanding and supporting the *ideology critique* of this study, and it is particularly relevant in understanding the fifth form of ideology in Giddens’s framework.

For instance, Townley’s (1993) study illustrates how panopticism is present in HRM practices and is distributed through dominant HRM discourse, which consistently accentuates various performance measurements, appraisals, and evaluations that are eventually absorbed by the employees themselves. Townley points out that especially those employees who feel that their position is precarious are likely to internalize the HRM discourse to insinuate their commitment to their superiors. In other words, Townley (1993) manages to describe how the discursive development of HR experts and HR knowledge was applied to subordinate and define employees. Similar action can also be used to engage workers in self-surveillance with respect to the expectations and norms established by actors other than HR management (for strategy management see Knights & Morgan, 1991; for diversity management see Zanoni & Janssens, 2004; for project management see Hodgson, 2002). Alvesson and Willmott (2002) speak about “identity work” and Rose (1989/1999) about “governing the soul” to describe disciplinary power that efficiently shapes and creates the employee’s subject and makes the employee seek an ideal employee self. Here, I also refer to Foucault’s (1992) related idea of the *technique of the self*, through which it is possible to analyze how HR discourse can turn employees into self-fulfilling subjects. The employees believe they “fulfill” themselves when they feel that they have met their manipulated subject. Hence, power always requires the active participation (whether conscious or unconscious) of the person over whom the power is exerted because he has to accept his

changing subject by assimilating a new identity. Foucault (1992, pp. 10–11) defines the technique of the self as follows:

[T]hose reflective and voluntary practices by which men not only set themselves rules of conduct, but seek to transform themselves, to change themselves in their singular being, and to make their life into an oeuvre that carries certain aesthetic values and meets certain stylistic criteria.

However, I find it worth accentuating that all Foucault's above-mentioned ideas are as applicable to the corporate "elite" and management as they are to any "ordinary" employee. Social processes that cause feelings of subjugation to surveillance, differentiation, comparison, and homogenization indeed create a constant comparison between "others" and "I" and shape the subject of anyone involved. As Fox and Miller (2006, pp. 642–643) put it, Foucault's power is crafted out of institutionalized rules, practices, and norms, and particularly out of discourses that rotate around rules of exclusion and inclusion, making individuals seek inclusion in the expected norm, regardless of whether it is achieved by "incarceration, lobotomy, or Prozac." Foucault (1980) does not treat the subjects of a "criminal," "madman," "homosexual," or "manager" differently because such categories equally define how people feel "who they are" and perceive how other people treat them. Naturally, the ways in which for example managers and criminals are treated are, at least in most cases, fairly different. Nonetheless if the "elite's" subject is equally manipulated, we can also say that Foucault's power differs slightly from that of the Critical Theorists. Whereas the Critical Theorists believe that power lies in the domination that makes power relations appear natural and inevitable, and in manufacturing consent, Foucault sees power in subjectification and in attempts to shape the sense of self, which applies to any individual. Thus power is not concentrated in a single position at the top of an organization hierarchy or of the state. Fleming and Spicer (2007, p. 23 as cited in Fleming & Spicer, 2014) neatly outline the point as follows:

Here, the focus is not on decision-making or non-decision making, or the ideological suppression of conflict, but the constitution of the very person who makes decisions. According to Foucault, power is achieved through defining the conditions of possibility underlying

how we experience ourselves as people. Power, therefore, produces the people we feel we naturally are.

As mentioned before, Foucault's genealogical phase was not the last stage of his intellectual career and influence, but for organization scholars the genealogy phase is the most prominent one (Välakangas & Seeck, 2011), and, considering that Foucault is not the primary building block of this literature review, I will only elaborate one more relevant concept; *genealogy*. To my mind, the concept is essential for this study, as it elaborates the distortions that ideologies can create when history is analyzed and made sense of, and it appropriately supplements and challenges the ideal of Critical Theorists according to which it is possible to gain an undistorted picture of the past.

It is generally argued that the philosopher Friedrich Nietzsche was the first to introduce the concept of genealogy [*die Genealogie*]. He discussed it at considerable length in *On the Genealogy of Morality* (2006), which was published in 1887. In this work, he sought to revise and supplement Paul Rée's (1849–1901) book on the origins of moral sensations, published in 1877. Nietzsche criticizes the established moral values of his time and traces the historical evolution of several morality-related concepts such as good, evil, guilt, responsibility, law and justice, and conscience. Nietzsche's critique particularly targets Christian moralization, as combined with modern civilization, and his essential aim is to describe "the history of the deformation of the human animal" (p. xiii), referring to us as animals who falsely see themselves as inherently superior to nature, and who "invent ever new tables of what is good and then accept them as eternal and unconditional" (p. xvi). While this "deformation" resembles Derridean deconstruction, which is also used by many CMS scholars, Nietzsche's main argument in brief is that we take for granted our morality as if its development had been objective and free from the impact of past ideologies and power relations.

Foucault was greatly influenced by Nietzsche's work, but whereas Nietzsche targeted his critique at morality, in *Nietzsche, Genealogy and History* (1984) Foucault steered his practice of genealogy to matters such as sexuality and other aspects of everyday life. Nevertheless, as with Nietzsche, Foucault's genealogy aims to deconstruct the "truth" and point out that those aspects of life that we tend to believe have the least history are in fact also ideological artifacts established historically through power. Foucault also directed his genealogy toward science as much as

religions, myths, or traditions, and he questioned the Enlightenment's idea of a linear process of development and of the possibility to search for origins, arguing that the past can be plural and contradictory, hence making all truths questionable. In the following statement, Foucault (1984, p. 76) walks the same path as Nietzsche in criticizing Paul R  e and brilliantly illustrates his view on genealogy:

He [Paul R  e] assumed that words had kept their meaning, that desires still pointed in a single direction, and that ideas retained their logic; and he ignored the fact that the world of speech and desires has known invasions, struggles, plundering, disguises, ploys. From these elements, however, genealogy retrieves an indispensable restraint: it must record the singularity of events outside of any monotonous finality; it must seek them in the most unpromising places, in what we tend to feel is without history –in sentiments, love, conscience, instincts; it must be sensitive to their recurrence, not in order to trace the gradual curve of their evolution, but to isolate the different scenes where they engaged in different roles.

Foucault's genealogy has also been under criticism across the social sciences and even called "anti-historical" (Rowlinson, Stager Jacques, & Booth, 2009, p. 295; see also Prasad, 2005, pp. 257–259). Nevertheless, I consider Foucault in general as a perfectly suitable intellectual to include in this literature review, and the fact that he shares great epistemological similarities with the Frankfurt School thinkers makes it understandable that together they have enabled the birth of Critical Management Studies, which I will introduce next.

## 1.9. Critical Management Studies

---

Considering how corporations, and particularly large MNCs, can be viewed as pivotal political and structural tools in serving the benefits of the ruling classes and they, at least implicitly, have throughout their existence tried to define what we should be and how we should behave in our lives (see e.g., Epstein & Robertson, 2015; Packard, 1957), it is understandable that the managers who run such institutions are a special group of people to investigate from critical perspectives. In addition, there is reason to believe that the commonly accepted idea that managers

organize, coordinate, innovate, plan, and control does not necessarily reveal much, if anything, about the ambiguous and political organizational reality. Moreover, multiple scholarly interpretations of organizational “reality” have certainly existed since the very birth of modern capitalism and the establishment of management as a science, but it was not until 1992 that the critical perspectives were given an academic home. From the foundations of the Frankfurt School and, to a lesser extent but still prominently, from the postmodernism/poststructuralism of Foucault and Derrida, and Braverman’s (1974) Labor Process Theory, as a distinct and coherent research field, Critical Management Studies was materialized by Alvesson and Willmott (1992) in the book *Critical Management Studies*, of which they were editors. (Adler, Forbes, & Willmott, 2007).

The birth of CMS was particularly “refreshing” for Marx-minded organizational scholars. Now it was not only the vast questions regarding Marxist superstructures and systems of production that were assessed; less grandiose issues (e.g., relating to decision-making, compensation and control in organizations) were also accepted as valid and their contribution to organizational “micro-emancipation” recognized (Fleming, 2013, p. 484). Also, the emerging CMS field opened doors for including critical management in university education particularly in the UK (Perriton, 2007), where “decidedly critical management departments” have subsequently been established at several valued universities like those at Leicester and Queen Mary (Hartmann, 2014, p. 613). Since the early 1990s, CMS has become a legitimate approach within management and organization studies (Alvesson et al. 2009; Peltonen & Vaara, 2012) with its own international conference and a research stream in the Academy of Management. However, one should of course always be cautious when discussing research “fields,” because they are socially constructed entities, and also CMS’s status as a concrete field or “movement” can and should be rightfully challenged (Mills & Helms Mills, 2013). This is partially because of CMS scholars’ uncritical use of history in constructing the historical narrative of their own research field, which, like presented above, has been argued to begin from the book edited in 1992 (Prasad, Prasad, Mills, & Helms Mills, 2016, p. 8).

The holistic and immediate proximity between the Frankfurt School and its *ideology critique* and CMS became apparent in 2003 when Alvesson and Willmott (2003, pp. 16–19) pinpointed distinct streams and aims within the CMS research

tradition: (1) developing a nonobjective view of management processes and techniques – formal techniques are considered as subjective as informal social practices; (2) exposing asymmetrical power relations as organizations can be considered microcosms that reproduce and enact wider power structures. Critical inquiry aims to expose the privileged position of corporate elites such as top management; (3) counteracting discursive closure, that is, to break up the communicative blocks built to hinder or prevent open and democratic discussion about rational management practices by the various stakeholders; (4) revealing the partiality of shared interests – organizations aim to promote goals for the sake of the common good although in reality they may serve only the interests of a limited clique; (5) appreciating the centrality of language and communicative action; linguistic and discursive focus works as a bridge between questions related to class, power and ideology and the local construction of social meanings in organizations.

In other words, CMS aims to heed the one-dimensionality of our cultural beliefs and also the ways in which the interests of the powerful have been served through ideological constructions. Communication is restricted to ideologically acceptable discourses, and the potential for a free stream of debate is suffocated by the accumulation of authority and power. This happens in a world of conflicting interests between the privileged and those who do not have the same access to the advantages of modern day capitalism. CMS and its representatives are willing to emancipate alienated employees so that they can achieve their full potential and, furthermore, articulate their own benefits more effectively in corporate communication and decision-making. (Peltonen & Vaara, 2012).

It can be said that the CMS scholars are committed to viewing societies with the aim of transcending or overthrowing the ideological limitations of existing social arrangements and of addressing how acts of powerful agents and cultural traditions contribute to “freezing” social reality to serve certain interest groups at the expense of others (Alvesson & Deetz, 2000, p. 9). People are considered to be dominated by the ideological superstructures within which they interact, and that this forms a wedge between them and their true consciousness, that is, alienates them. Moreover, this situation can be reproduced and made to appear natural, normal, and inevitable through dissemination of the dominant ideology. Thus, CMS (and critical science more broadly) aims to understand this state of affairs as an imperative

prelude to changing it. It aims to challenge ideology, contest hegemony, unmask power, overcome alienation, learn liberation, reclaim reason, learn democracy, racialize critically, genderize critically, and teach criticality (Brookfield, 2005).

As far as more concrete and practical guidelines for CMS are concerned, Alvesson and Deetz (2000) particularly accentuate the importance of reducing the voice of the elite that dominates most research data. Furthermore, they feel the need to emphasize the fact that CMS does not possess a negative view of managers and management in general, unlike some other radical schools. However, I personally argue that exceptions within CMS do exist, and those loyal to the young Marx and the Frankfurt School juxtapose the elite and the suppressed more radically, whereas the Foucaultian stream treats all organizational parties as equally dominated, albeit with different social outcomes. Nonetheless, CMS needs to be careful with broad-brushed approaches (e.g., simplified anticapitalism and general critique of disciplinary power) in order to avoid a situation where currently existing hierarchies and undemocratic social relations are replaced by similarly utopian and naïve ideals. This is something that I have also tried to keep in mind throughout this book.

To my mind, CMS not only has an important but also a rather complex role to play in enabling an open and critical dialogue between, for instance, various members of organizations, external social groups, and the larger societies in which they function. The CMS stream has an obvious activist tendency, and its intentions at least seem noble and appeal to me. However, CMS scholars and their premises have also been rightfully criticized in academic debates. With regard to criticism of CMS, it should not be too difficult for management and organization scholars to notice how consensus-driven mainstream studies differ from dissensus-driven CMS (see Deetz, 1996 for details about the consensus vs. dissensus question). One of the most notable differences is, how the (positivistic) mainstream studies believe that with methodological choices we can separate the knower from what is known, pursue instrumental rationality, thereby opposing the view that all knowledge is socially constructed and implicitly impacted by dominant ideologies. It can be argued (e.g., Duberley et al., 2009) that precisely because of the social constructivism and will to cherish epistemological relativity and plurality in the CMS tradition, the CMS community has difficulties in presenting *credible* objections to the mainstream, which believes in the concreteness of science and its

objectivity. Moreover, the CMS stream has been accused of lacking empirical studies and historical rigor compared with their mainstream counterparts (Rowlinson et al., 2009). In addition, one of the better known critics has been the business theorist Jeffrey Pfeffer, who is not only sceptical of the finiteness of empirical studies but especially of the overly philosophical nature of the studies, which does not serve the field:

There are number of branches of critical theory, some of which operate largely in the realm of philosophical discourse and some that launch empirical challenges to existing organizational theory. The focus here is on the more empirically grounded critical approaches. Organization theory is, after all, fundamentally a social science; although philosophy and moral reasoning are important and interesting, critical theory has had and probably will have its most effect where it engages organization studies in a realm with testable empirical implications. (Pfeffer, 1997, p. 178)

Whereas Pfeffer may have a strong and large group of supporters in arguing that critical theory is overly philosophical and lacking in empirical studies, CMS scholars can naturally respond by arguing that their contribution is *precisely* intended to make morality and philosophy a more integral part of management and organization studies. Here, we can see that debates over paradigm borders are difficult due to fundamental epistemological differences, which is exactly why in this book I will shed light on criticism of Critical Theory (including CMS) that has emerged from within its own paradigm.

However, before taking up such criticism, I will elaborate and introduce the subfield of CMS: Critical Human Resource Management and reflect on the specific HRM-related differences and debates between the critical stream and mainstream studies. Additionally, I will discuss previous studies that have dealt with HRM from the viewpoint of ideology.

## 1.10. Critical HRM Studies

---

Although some critical HRM-related books were already being written in the late 1970s (e.g., Legge, 1978; Watson, 1977), since the beginning of the 1980s, human resources and the position of personnel have arisen in the theoretical debates with the general

tone diverging from previous academic discussions (Legge, 2005). Increased interest in human resources and people may be a result of a growing international division of labor, which, particularly in the West, has put considerable pressure on MNCs with strategies that rely on mass production and cost leadership. Thus, company rhetoric and discourse were also redirected so that human resources and *people* became the most essential focus of companies and HRM practices part of overall company strategies (see chapters introducing HRM's development in the 1970s and 1980s). HRM discourses became dominated by normative and consensus-oriented perspectives on management of personnel relations. The possibility of resistance and conflict in HRM-based initiatives was ignored, and the conventional understanding of company management as a culturally unified body lacking in subjectivity was stressed (Francis, 2006). However, critical scholars doubt that anything had actually changed since this discursive shift of the 1980s and suspect that previous managerial control mechanisms have prevailed and continued to increase inequality, although in a more subtle manner (Grant, 1996; Keenoy & Anthony, 1992; Keenoy, 1990). Concepts of HRM vary radically in practical business life and in academic texts, and it has been said (Torrington, 1989, p. 60) that HRM means whatever the experts want it to mean, which arguably leaves room for ideological use of the concept. Consequently, among critical HRM scholars, especially since the 1990s, modern HRM – and the discourse around it – is generally treated as an ideological smokescreen meant to soften practices and blur perspectives, thereby allowing corporate management to continue their efforts to improve market mobility (Mueller & Carter, 2005).

As will be seen in the chapters on the historical development of HRM in the empirical section, HRM (and research on it) is a phenomenon of late modernity, in terms of positivistic and realist epistemology, and its periodization. For critical HRM scholars, there is no reason *not* to observe HRM and the discourses around it from a critical perspective. For example, HRM can be deconstructed from the postmodernist perspective by “engaging in notions of social construction, actor network theory, the hyper-real and language games” (Legge, 2005, pp. 352–353). Moreover, in addition to the postmodernist type of deconstruction, HRM can and *should* also be explored from the perspective of Critical Theory (e.g., Greenwood, 2013; Islam, 2012), which considers HRM the manifestation of a broader ideological

setting where prevalent forms of understanding are formulated by the structures of power and unquestioned social assumptions (Peltonen & Vaara, 2012).

Hence, critical HRM studies openly combine a critique of symbolic issues around values, identity, and the employee subject and their manipulation, and also economic questions of material redistribution and the interplay between power relations, control, and knowledge (see e.g., Sewell, 1998; Townley, 1993; Zanoni & Janssens, 2004). Delbridge and Keenoy (2010) have identified and listed themes that critical HRM scholars have taken from broader CMS studies. They have also added to the list above how challenges to the structures of domination and moving beyond instrumentalism have been pivotal research topics. Also, Greenwood (2002, 2013) mentions that critical HRM scholars have dedicated much of their work to criticism of the mainstream HRM field for not being a true “science,” not to mention the “scientific” position of HRM as applied to corporate life (see also Hesketh & Fleetwood, 2006; Keegan & Boselie, 2006). Scholars have also taken up the following issues: the hegemony of positivistic and functionalist HRM research (Dyer & Humphries, 2007), the focus on MNCs instead of small and medium-sized enterprises (SMEs), the emphasis on Western nations, the tendency to omit minorities (Delbridge & Keenoy, 2010), the dominance of US-based theories (Fotyga, 2007), and the mainstream’s obsession with organizational performance and inability to link it to HRM (see for example, Legge, 2001 or research reviews by Boselie, Dietz, & Bon, 2005; Wall & Wood, 2005). As can be seen from the themes above, the critical HRM tradition seems to be well aligned with the critical research tradition in general.

Without doubt, the critical HRM research field has taken several leaps forward and developed a distinct identity within the CMS and academia in general. HRM tends to be one of the central streams in the biannual Critical Management Studies Conference and in the CMS division of the Academy of Management conference, and distinguished journals such as *Organization* (1999/6), and *International Journal of HRM* (November 2011) have devoted special issues to epistemologically critical HRM papers. Nevertheless, much justified criticism has been targeted at critical HRM studies. According to Watson (2004, p. 452), there is above all a need for critical HRM scholars to stop treating employees as the “passive dupes of ideologists” when they engage in a critique of ideology. Guest

(1999, p. 21) provocatively takes the same line when arguing that the tendency of scholars such as Legge to dismiss normal people as “cultural dupes” might be “as or even more exploitative, than that which [she and other “critical writers”] claim of HRM.” Furthermore, Grant and Shields (2002) consider it troublesome that critical HRM scholars find soft (normative) and hard (rational) HRM practices more or less equally destructive (both materially and emotionally) without sufficiently differentiating between them (see more about soft and hard HRM practices in chapter covering HRM’s development in the 1970s). They also consider it contradictory that critical HRM studies on the one hand contend that HRM practices do not even work in reality (for example, in terms of company performance), and, on the other hand, critical scholars such as Keenoy (1997, 1999) consistently point out that no unified form of HRM has ever been practiced in corporations. Hence, how can something that is failing or not even being practiced be so ominous and destructive to employees? Lastly, Grant and Shields (2002) point out how “criticality” should be connected to the treatment of employees as subjects. However, most studies treat employees as passive and unquestioning objects rather than subjects, if they indeed give voice to employees in the first place.

Some scholars (e.g., Kelly, 2004; Watson, 2004) have wondered why there are so few critical notions about HRM in university teaching, although critical studies and textbooks are available. I personally think that a great many university teachers involved in teaching (and research) could and would include critical notions in teaching *if* there were easier ways to combine mainstream and critical ideas on HRM and its function, in addition to more metatheoretical understanding. It indeed takes character to say something that will then be fundamentally questioned or even “demolished” in the next lecture. After all, very few studies attempt to open a constructive dialogue between the two epistemological strands; it would seem that cooperation and compromise of any degree are impossible.

Also, one reason for the lack of critical university education might be found in the statement (most notably presented by Alvesson, 2009) that when comparing HRM with many other subfields of management, there are actually rather few ambitious critical HRM studies, and not enough *ideology critique* has been conducted, especially from a historical perspective. Also, Islam (2012) argues that Critical Theory has a lot of unused potential

in the context of HRM studies, and this potential could be dug out by bringing ethics more properly into the HRM discussion. Understandably, although the alliance between ethics and HRM has been discussed before (e.g., Hosmer, 1987) and is discussed increasingly today (Janssens & Steyaert, 2012; Rhodes & Harvey, 2012), investigating HRM ethics, particularly from the perspective of Critical Theory, is pivotal (Islam, 2012). Boje (2008, Chapter 1) states that the Frankfurt School represents so-called “critical ethics,” which he finds an increasingly important conceptualization of ethics for organization studies. The essence of critical ethics can be found in the belief that “we have answerability to bring about change in our complicit systemicity producing unethics” (p. 4), that is, studies concerned with employee emancipation and increasing democracy in organizations through radical change are, *de facto*, deeply concerned with ethics, albeit without necessarily using the term “ethics.” I argue that agreeing with the following statement by Rost (1995, p. 141) comes close to accepting the need for critical ethics:

Our organisations and communities need a way out of the materialistic, individualistic, self-interested, short-term, pragmatic, cost-benefit driven, male-dominated, rational, management-oriented culture that is the primary cause of our present malaise. They need a sense of moral responsibility, a collective purpose to be virtuous in pursuing the higher moral ground, a new understanding of and care for the commons, and the ability to regenerate themselves throughout the exercise of leadership.

We can conclude that while critical HRM studies have successfully scrutinized a great variety of important themes and managed to serve as an “opposition voice” in a government ruled by mainstream studies, there are still weaknesses and flaws in the field, a need and potential for further studies as well. As this study is an *ideology critique* of HRM and its evolution, in the end of this chapter, I would like to introduce existing studies of HRM and their ideological evolution. However, it should be stressed that epistemologically, those few existing ideology studies cannot be placed in the box of critical studies, as they instead embrace positivist epistemology and in fact conceptualize ideology differently than Critical Theorists.

Perhaps, the best-known study investigating the ideological dimensions of HRM (and its predecessors) is the one by Barley and Kunda (1992). However, the crux of their paper is an outline

of the evolution of American *managerial* ideologies and capitalism since the 1870s, thereby merging people management with general management. By analyzing bibliographic business periodical data over a 100-year period, Barley and Kunda discovered that the general tenor of managerial discourses has alternated between the normative and the rational, taking turns of approximately 30 years. These 30-year cycles essentially divide the styles in which management subordinates labor. Normative (they can be also called “soft”) styles include industrial betterment 1870–1900, human relations 1923–1955, organizational culture 1980–1992, and rational (“hard”) styles such as scientific management 1900–1923 and systems rationalism 1955–1980. Interestingly, Barley and Kunda argue that it was the larger economic trends that caused these cycles, because in times of economic downturn management focuses more on labor and uses normative ideologies to motivate employees when financial incentives are scant. Alternatively, when the economy starts to boom again, management favors rational and automation-focused procedures.

However, although inspiring, informational, and influential, the study of Barley and Kunda is not an *ideology critique*, but rather a descriptive map, and, starting from the conceptualization of “ideology,” its aims and content differ from this study. Also, its conclusions do not put much weight on the internal efforts of organizations or of labor, something that Abrahamson (1997) ingeniously questioned. Abrahamson (1997) found (by using a significantly larger dataset than Barley and Kunda) that labor activity and labor “militancy” can trigger significant change in managerial ideologies, and for example, major changes in union activity have had an impact on managerial discourses within the 30-year cycles. Nonetheless, this book primarily treats the study of Barley and Kunda as an elucidating study of the history of management rather than an exposé of the ideology behind it. In addition, I have used books by Perrow (1987), Guillen (1994), Jacoby (2004) and Gantman (2005) for a similar purpose. They also include thorough discussions of managerial ideologies, but despite being critical, they tend to treat ideology as something visible and concrete and therefore differ in their conceptualization of ideology from the critical tradition.

Geare et al. (2014) have investigated the ideological aspects of employees’ workplace values and beliefs in creating more understanding of HRM. They also see (p. 2277) ideology as “a connected set of beliefs, attitudes and values held by an identifiable social group which refer to a specific aspect of social reality,

which compromise normative, empirical and perspective elements and which may be at a general or particular level.” From the perspective of critical epistemology, however, this means that the focus is on easily detectable aspects of “social reality.” Their findings accentuate the idea that HRM can be ideologically seen as either *pluralist* or *unitarist*, depending on whether the employees have the same ends as the employer and share a similar identity. Despite some relevance for this study, to my mind the treatment of ideology by Geare et al. – and the social reality from which it emerges – is too simplified to serve reflective purposes in this paper.

It seems that to date there have been very few studies exploring ideology and its evolution in the context of HRM. None of them explores the questions from an epistemologically critical perspective, and even within CMS the Critical Theory approach to HRM in general is seldom encountered. Nevertheless, to my mind relatively similar approaches to this study can be found in sociological research on *recognition as an ideology*, most prominently and recently by Axel Honneth. Honneth, a German Critical Theorist who was a former student of Habermas and since 2001 the director of the Institute of Social Research at the University of Frankfurt (i.e., the original Frankfurt School), does not specifically focus on organizational management practices, but nonetheless his ideas bear a significant relevance. Honneth (2004, p. 323) neatly encapsulates the ideological function of recognition in this quotation:

The act of praising certain characteristics or abilities seems to have become a political instrument whose unspoken function consists in inserting individuals or social groups into existing structures of dominance by encouraging a positive self-image. Far from making a lasting contribution to the conditions of autonomy of the members of our society, social recognition appears merely to serve the creation of attitudes that conform to the dominant system. The reservations entertained with regard to this new critical approach thus amount to the thesis that practices of recognition don't empower persons, but subject them. We could summarize this objection by saying that through processes of reciprocal recognition, subjects are encouraged to adopt a particular self-conception that motivates them to voluntarily take on tasks or duties that serve the society.

Earlier I wrote about Althusser’s definitions for ideology – namely how he sees it as an inevitable part of any society and as the social cement that enable domination by making the subject imagine himself as a “free” agent. Honneth owes something to Althusser. In a chapter concerning ideology and ideological state apparatuses, Althusser (1977) makes it clear how the subject can be impacted through public recognition, which he describes as a common mechanism for *all* ideologies. In addition, Jacques Lacan’s psychoanalysis (2006 as summarized by Kenny, 2012) also dealt with the concept of recognition in a more individualized sense. Lacan (2006) rationalizes that beginning in childhood, our fragile sense of the self makes us try to identify with other persons. As the individual develops into an adult and learns the social mechanisms (norms, habits, cultural beliefs, laws, language) that enable such identification, he seeks recognition from others (“dominant signifiers”); an act that becomes obsessional for the imperfect subject. Without assimilating with the immediate contexts of culture, language, and knowledge, the individual becomes an “abstract” and “isolated” subject without concrete interactions and relationships (Letiche, 2008, p. 305).

Now, although Honneth speaks about how recognition makes one voluntarily conduct tasks and duties serving “society” as a whole, there are studies (e.g., Hoedemaekers, 2009; Roberts, 2005) of how “dominant signifiers” are also deeply rooted in the managerial discourse of organizations. Managerialism is also filled with “existence-confirming recognition” (Roberts, 2005, p. 619), and HR management arguably exercises such recognition in the frontline of all managers, hence making much of HRM discourse ideological and analyzable in Honneth’s terms.

I would like to sum up the section by saying that although recognition literature is not often linked to HRM, it still shares features with the *ideology critique* and can be rightfully discussed in the context of HRM. Hence, it is more similar to this study than to previous studies discussing HRM’s ideological features, highlighting the need for this study as a type of pioneer work in critically mapping the ideological evolution of HRM.

## 1.11. Critique of Critical Theory

---

Critiques of Critical Theory have traditionally emerged from two streams: (1) those who are largely antagonistic to the broader

critical traditions and (2) those who are relatively sympathetic to its fundamental aims (Prasad, 2005). Considering that the first stream mainly follows a positivistic path and sees Critical Theory as overly anecdotal and unscientific, arguing that it is impossible to make reliable generalizations through it especially as the researchers are overly biased by virtue of their own openly presented values (Donaldson, 1985), I prefer to focus on the second stream here. Also, the epistemological foundation of the first stream of criticism clearly differs from that of Critical Theory, which to my mind makes their critique less relevant to this literature review (i.e., it can become a dull debate when the judgment of Critical Theory relies on positivistic standards that have practically no meaning in this tradition). However, I would like to stress that of course the opposing epistemologies and schools of thought also have proper and well-rationalized arguments against Critical Theory.

If interpreting Burrell and Morgan's (1979) paradigm borders loosely and retrospectively, the critics from the second stream could vastly be placed within the same radical humanist paradigm in which Critical Theory plays a key position in opposing mainstream strands of the social sciences (Duberley et al., 2009). Despite their obvious kinship, Critical Theory and poststructuralism (postmodernism) in particular have been on a collision course for decades. Perhaps, most famously poststructuralists such as Lyotard and Derrida have criticized Critical Theory by arguing that it merely echoes the grand narratives or metanarratives of the Enlightenment and modernity. Particularly, by repeating the Marxist grand narrative of materialist and economic class struggle, Critical Theorists have cultivated a "narrative of emancipation" (Lyotard, 1984, p. 60) based on Freudian and Marxian metanarratives. Habermas (1990), however, relentlessly believes that modernity can still be "fixed" regardless of its weaknesses. He then asks the following: if all thought simply represents repetitions and variations of primordial sources, what then is the status of structuralism itself as it has been unable to deconstruct its own metanarrative?

Moreover, Habermas (1982) accuses poststructuralists for being "neo-conservatives" who provide support for bourgeois ideals. Essentially Habermas (1987, p. 78) sees neo-conservatism as a movement that "emerges from a response to a disappointment" on the part of conservative intellectuals with the leftist social, political, economic, and intellectual trends of the 1960s. Habermas claims that they abandoned the notions formulated by

Critical Theory to justify the various reforms which have marked the history of Western democracies since the Enlightenment and which are still used in criticizing the socioeconomic institutions of the West and East. Critical Theory aims to present a relatively universalistic philosophy that, despite all its problems, is needed to support liberal politics, unlike the relativistic ideas of the poststructuralists, which Critical Theorists accuse of providing a passive and “context-dependent” sort of social criticism (Rorty, 1987, p. 162). Hence, the dilemma seems to be that of a radical change; poststructuralists (or postmodernists) are considered conservative as they neglect the idea of radical change as a fundamental driving force, whereas for classical Critical Theorists emancipation can only be achieved through radical change (Burrell & Morgan, 1979), which should anyway be the aim of any “real research” in the social sciences in order to achieve constructive action and contribute significantly to altering consciousness (Chomsky, 2011, p. 72).

Furthermore, Hegel, Marx, and Critical Theorists are all accused of being stuck in looking for change and emancipation through rigidly *state-centred* practices, with a particular focus on the nation-state, reflecting their ideas from a comparably homogenous (1800-WWII German) environment. The well-known contemporary Critical Theorist Darrow Schecter considers state-centrism a rapidly strengthening obstacle to the development of Critical Theory. In his *Critical Theory in the Twenty-First Century* (2013), he states how on-going globalization and economic crises, shifts from stratification to differentiation, mutable migration patterns and structural transformations in the mediations between individuals and social systems are incrementally engendering high levels of system complexity and individualization that will eventually become incompatible with traditionally conceived unities such as the organic bounds of nations and the legal legitimacy of states. Consequently, political and legal systems will become increasingly differentiated, and the legal system will take its place among several other social systems, so that legality may lose its power in providing the content of legitimacy. According to Schecter (2013, p. 184), Critical Theorists have to realize how this will impact people-government-state relations and act accordingly, because “one can safely say that the period of unifying, ready-made political forms and centralized, state-centred mediations is passing.”

In addition, the political theorist Anita Chari (2010) endorses Schecter’s arguments by arguing that Critical Theory is increasingly

challenged in formulating a historically specific and politically relevant critique of capitalism, as the neoliberal capitalism of 21st century includes a new kind of articulation where the borders between the economic and the political have been redefined in a way that is beyond the imagination of the Frankfurt School. Chari (2010) is also concerned about the “blind spot” of current Critical Theory as it has not been able to adequately build a bridge between social theory and everyday disrespect and injustice within the corporate world. Moreover, she finds a seed of trouble in the concept of ideology as it is perceived by the Critical Theorists: According to Chari, the concept (1) presupposes a “truth” to which ideology stands in opposition; (2) implies that it is secondary to material infrastructure; (3) proposes a universal subject.

Another contemporary critic of Critical Theory has been Stephen Feldman (2000) who is irritated by the tendency of Critical Theorists to promote destructive forms of individualism that cut off all connections to past traditions in the name of individual emancipation. Feldman (2000, p. 623) cites political philosophers such as Arendt and MacIntyre to justify how the dependence of criticism on the past is important “because maintaining part of the past in the present is required to provide continuity and stability in moral conduct.” Moreover, Feldman (2000) equates the notion of *ideology critique* with a complete rejection of the past and the great progress of moral traditions. Consequently, Feldman does not interpret Critical Theory in the way that it aims to reject those traditions and cultural practices that are *hegemonic* in nature, but rather all the Western history. His opponents could argue that although even the hegemonic part of history is not forgotten, abandoned, or rejected, Critical Theory’s aim is to *revise* such cultural artifacts while acknowledging the absence of complete neutrality also in their own form of knowledge production.

Although feminism has traditionally had a close relationship with Critical Theory (Martin, 2003), Weedon (1997) has argued that Critical Theorists are regularly gender blind as they fail to differentiate the experiences within oppressed groups (e.g., men and women, straights and gays, people of different ethnicities) and hence ignore the possible tensions and animosity in the dominated groups themselves. Also, Scherer (2009) highlights Critical Theory’s lack of understanding of gender-related forms of suppression and domination and its dismissal of patriarchy as a source of oppression.

Like with feminism, serious “cousin” criticism of Critical Theory has also been provided from the postcolonial school of thought. Prasad et al. (2016, pp. 17–20) point out how CMS in particular lacks non-European views and how their own writings imply an uncritical hierarchy (in terms of race, nation, culture, etc.) “that underwrites the work of major European thinkers”. In addition, Prasad (2005) explains how postcolonialists are disturbed by the monotonous focus of Critical Theorists on a Western context in their *ideology critique* and by their inability to distinguish between Western forms of domination over non-Westerners and to recognize the patterns of domination existing in the West itself. Apparently, Critical Theorists have not found a proper response to this, and they have namely come to admit their one-sidedness toward the West due to the significant degree of social and economic inequality that exists within the dominant Western ideology (Brookfield, 2005). Alternatively, they could point out that postcolonial domination patterns can exist also in and between countries that are traditionally labeled “Western,” such as in the Nordic countries (see e.g., Itani, Järnlström, & Piekari, 2015).

Another strong critique of Critical Theory has been that of Foucault, especially his power analytics and genealogy, which in his opinion provide a better critique of the nature of power than Critical Theory has ever been able to do (for an elucidating overview of the debate, see Ashenden & Owen, 1999). In addition, Foucault (1988c) has confronted the normative ideals of classical Critical Theory and the idea that there could be a state of communication in which the games of truth could somehow circulate without coercive effects and constraint. He (1988, p. 18) provocatively referred to this as a “utopia.” For Habermas (1987), Foucault’s disbelief in the Enlightenment’s ideal of a rational critique of existing institutions made him a neoconservative intellectual in the manner of Lyotard and Derrida. In other words, if there were no difference between mystification and knowledge – just power and discourse – one would be profoundly unable (or unwilling) to provide a theoretical alternative to advanced, exploitative capitalism. This idea would completely wipe out the dynamic to which liberal social thought (e.g., John Rawls in the US and Habermas in Germany) has relied upon, that is, the need to be in touch with a reality obscured by “ideology” and disclosed by “theory” (Rorty, 1987, p. 171).

However, Foucault was hardly the first or the only critic of the classical Critical Theorists for their engagement with the

Enlightenment. Hence, Horkheimer and Adorno, the backbones of the Frankfurt School, wrote the *Dialectic of Enlightenment* (1944/2002) to elucidate the paradox of the Enlightenment project – that it produces oppression and destruction as well as liberation and progress – and make room for Critical Theory to overcome it. Although, the Enlightenment project is devoted to critique and replacement of the earlier belief systems grounded in tradition, superstition, common sense with fundamentally more rational forms of thoughts and practice, it is unable to hide its own forms of dogma and deprivation (Alvesson & Willmott, 1996). Adorno and Horkheimer wanted to shift the target of Critical Theory’s critique from capitalism to Western civilization. They argue that modern civilization has become mesmerized by the power of the unilateral, instrumental concept of reason, and the positivistic stream of science – considered the benevolent agent of the Enlightenment – has made people blind to or trapped in the connections of scientific and technocratic societies. Moreover, these connections turn out to be significantly more destructive than the premodern traditions replaced by them, particularly as science and technology have made people dominate and exploit nature in the most ruthless manner (to further understand and reinforce Horkheimer and Adorno’s ideas, see also Heidegger’s 1954/1977 *The Question Concerning Technology* for a critique of modern technology and humanity’s role in it).

Consequently, Western civilization *per se* should be the main target of critique, because some of its agents naturalize and mystify the destructive forces of science and present worrisome social phenomena existing beyond human powers, rather than as political artifacts. Put differently, Critical Theorists have to understand that one-sided ideological research is conducted under the Enlightenment project and the scientific knowledge engaged in emancipation has to expose it (Horkheimer & Adorno, 1944/2002). Although Horkheimer and Adorno’s work was to become the magnum opus of the Frankfurt School, Habermas (1982, p. 13) was highly critical toward of the *Dialectic of Enlightenment*, arguing that it was “their blackest, most nihilistic book” echoing “the really nihilistic writers of the bourgeoisie” and made them join “post-structuralist writers such as Derrida and the recent Foucault.” Consequently, by accentuating the self-destructive power of the Enlightenment and disregarding its liberating power, Horkheimer and Adorno demonstrated the essentially pluralist nature of classical Critical Theory where

multiple interpretations can take place and provide internal, constructive criticism.

All in all, it seems apparent that Critical Theorists have to admit their own shortcomings, but, as the best-selling critical theorist Mark Poster (1989, p. 3) says, the tradition still remains “the best of what is left of the left.”