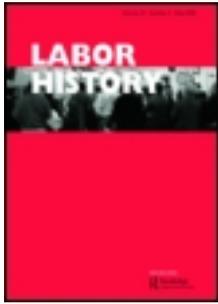


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Martin Upchurch^a, Anne Daguerre^b & Daniel Ozarow^b

^a Human Resource Management Department, Middlesex University, London, UK

^b Leadership, Work and Organisation Department, Middlesex University, London, UK

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Spectrum, trajectory and the role of the state in workers' self-management

Martin Upchurch^{a*}, Anne Daguerre^b and Daniel Ozarow^b

^aHuman Resource Management Department, Middlesex University, London, UK; ^bLeadership, Work and Organisation Department, Middlesex University, London, UK

This article examines self-management in the wider context of political economy and the role of the state. Most literature focuses either on labour process analysis or on social movement aspects of the phenomenon. Most importantly, there appears less emphasis on understanding the role of the state in shaping or reshaping practice, or the state is even eschewed as an inevitably conservative and bureaucratic independent agent. In developing our understanding, we utilise documents from Titoist Yugoslavia, and surveys and case study interviews conducted in Argentina and Venezuela. First, we examine self-management in Titoist Yugoslavia in the aftermath of the Tito–Stalin split of 1948. Self-management was a central policy of the Titoist regime as it sought to distance itself from authoritarian and bureaucratic Communism. Indeed, Yugoslavia has been used as a comparator yardstick in recent discussions of other experiments such as those in Chávez's Venezuela. To pursue this comparison, and make more sense of the role of the state and the market, we examine the particularities of the new movements for self-management and cooperative working in the contemporary Latin American arc of protest against neoliberalism, focusing on both Argentina and Venezuela. The national specificities of each of these two countries are different, with the recovered companies having emerged 'from below' in Argentina contrasting with the movement 'from above' as part of Hugo Chávez' Bolivarian Revolution and 'Twenty First Century Socialism' in Venezuela. In our examples, we present a model of spectrum and trajectory from which self-management can be judged within a frame of socialist transformation. We record the contextual factors which shaped the movements, and isolate the state's influence to either promote or contain them. In our conclusion, we analyse factors of continuity and change, and discuss the state's role in relation to these different episodes of workers' self-management.

Well we can try to measure democracy, just as you measure temperature with a thermometer, or pressure with a barometer. (Hugo Chávez, 1954–2013)

Introduction

Workers' control over production is associated with periods of societal transformation. In its most advanced form, it presents a challenge to capitalist property relations as part of a revolutionary process. Workers' Councils, as a form of self-management, have

*Corresponding author. Email: m.upchurch@mdx.ac.uk

occurred under capitalism but also in Communist command economy states.¹ The relationship between the practice of self-management and the class nature of the state is not, however, straightforward. The state, when perceived as an agent of coercion or control, may seek to either facilitate or suppress social movements which develop from below.² Facilitation may be used to institutionalise and contain conflict, whilst suppression may mean the use of force to dispel the movement. There remains strategic choice for the state because of the structural interdependency of state and capital. The state may thus act to restrict or contain the potential for self-management, most trenchantly within capitalism by resisting any challenge to property relations. An example can be taken from the revolutionary turmoil of Germany in 1918, when in return for concessions on trade union rights and recognition of collective agreements, the social democratic leadership of the unions agreed *not to touch* existing property structures or advocate any socialisation of occupied factories.³ Collaborationist *Works Councils* were then established as an *alternative* to the revolutionary *workers'* councils. The state also reflects the balance of class forces, including factional tensions between sections of the ruling elite, which further complicates the relationship. For this reason, it is vulgar to suggest that self-management should not be a legitimate project until the capitalist state is destroyed, just as we should not assume that the destruction of capitalism in state form would automatically lead to self-management and workers' control from below.

This article examines self-management in the wider context of political economy and the role of the state. Most literature focuses either on labour process analysis or social movement aspects of the phenomenon.⁴ Most importantly, there appears less emphasis on understanding the role of the state in shaping or reshaping practice, or the state is even eschewed as an inevitably conservative and bureaucratic independent agent. In developing our understanding, we utilise documents from Titoist Yugoslavia, and surveys and case study interviews conducted in Argentina and Venezuela.⁵ First, we examine self-management in Titoist Yugoslavia in the aftermath of the Tito–Stalin split of 1948. Self-management was a central policy of the Titoist regime as it sought to distance itself from authoritarian and bureaucratic Communism. Indeed, Yugoslavia has been used as a comparator yardstick in recent discussions of other experiments such as those in Chávez's Venezuela.⁶

To pursue this comparison, and make more sense of the role of the state and the market, we examine the particularities of the new movements for self-management and cooperative working in the contemporary Latin American arc of protest against neoliberalism, focusing on both Argentina and Venezuela. The national specificities of each of these two countries are different, with the recovered companies having emerged 'from below' in Argentina contrasting with the movement 'from above' as part of Hugo Chávez' Bolivarian Revolution and 'Twenty First Century Socialism' in Venezuela. In our examples, we record the contextual factors which shaped the movements, and isolate the state's influence to either promote or contain them. In our conclusion, we analyse factors of continuity and change, and discuss the state's role in relation to these different episodes of workers' self-management.

Some theoretical considerations

Self-management is a slippery concept and can be schematically located within a *spectrum* (see [Figure 1](#)). It may simply consist of shared decision-making within the capitalist labour

process and mode of production. As Ramsay suggested, employers may utilise forms of worker participation (joint consultation, profit sharing, etc.) as a way to *demobilise* worker militancy.⁷ In its most socially advanced form, however, it may embrace workers' control over both production and decision-making, enabled by the eviction of management from the enterprise, and the socialisation of ownership as part of a wider socialist project. Self-management may address the 'property question' by means of a full-blooded socialist project to overthrow capitalism. Workers' councils, as Bonnet suggests, 'show an inherent potential to overcome the division between the economic and political spheres. Considering that this division underpins the capitalist state, overcoming it means in fact overcoming the capitalist state itself'.⁸

Within this spectrum, we also discern a *trajectory*, whereby self-management may be seen as a mobilising force for social transformation away from capitalism, or, alternatively, forms of worker participation may be used by capital and/or the state in reverse trajectory to demobilise, contain or discipline worker self-determination. In a socialist transformative direction, the *circuit of capital* may be interrupted or even broken, as surplus is capable of being distributed socially rather than recycled in money or commodity form. De Peuter and Dyer-Witford construct a concept of 'labour commons' whereby the logic of such redistribution would act to create a 'circulation of the common' by which associated labour acts with redistributive motives, adding socialist principles to the practicalities of cooperative working.⁹ Self-managed factories may thus deviate from the capitalist social relations of production as they may replace capital as the mediator between the worker and their labour power. As such, self-management may not simply be seen as a technical exercise in workers' decision-making, but be seen in ideological terms, as an expression of challenge to the *logic* of capital.

For Marx, workers' cooperation in self-management 'was a practical demonstration that capital was not necessary as a mediator in social production'.¹⁰ Rosa Luxemburg similarly saw cooperatives positively as isolated units of 'socialised production'.¹¹ Both warned of the limitations of such projects still locked as islands of socialism in a sea of capitalism. For Marx, cooperatives 'naturally reproduce, and must reproduce everywhere in their actual organization all the shortcomings of the prevailing system'.¹² For Luxemburg, cooperatives were 'totally incapable of transforming the capitalist mode of

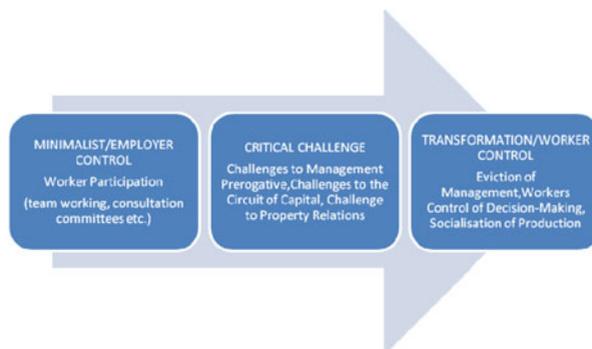


Figure 1. Spectrum and trajectory towards workers' control.

production' and could only survive 'by removing themselves *artificially* from the influence of the laws of free competition' (authors' emphasis).¹³ Thus, whilst cooperative working may challenge the circuit of capital, it struggles to do so permanently, and may only do so by existing artificially within the general logic of capital. The inference is that to be successful and sustainable, self-management, or workers' control, must be combined with a conscious socialist political project to overthrow capital and to construct a workers' state.

The state, labour and capital

Whilst classical Marxists have drawn caveats on the sustainability of self-management and workers' control within capitalism, others have been more circumspect about the efficacy of challenging state power. A pivotal debate on the role of the state and 'industrial democracy' took place within the wave of workplace occupations in Britain in the 1970s. The shock of engineering factory closures sparked over 260 rank-and-file led work-ins, occupations and worker cooperatives.¹⁴ A *movement* developed, crystallising ideologically around the Institute of Workers Control (IWC) and left-wing Labour Party leaders such as Tony Benn. Alternative political visions were promoted, including an 'Alternative Economic Strategy' of import controls, a siege economy and alternative production per se. An internal IWC debate then came to a head between the two positions of 'revolution or reform'. An article in *Socialist Register* by Richard Hyman challenged the 'reformist' position of the IWC as untenable.¹⁵ The majority position in the IWC favoured an extension of workers' involvement through practices of 'co-determination' not dissimilar to the system found in West German Works Councils.¹⁶ Hyman argued that workers' control could only be achieved by challenging the power of capital directly:

Each perspective demands wholly different strategies; yet within the IWC literature the issue appears fudged and confused. The lack of clarity on this point, it seems to me, reflects a more general ambivalence on the issue of reform and revolution.¹⁷

A parallel polemical argument gathered pace between the academics Ralph Miliband and Nicos Poulantzas, which added fuel to the IWC debate. For Miliband, writing in *The State and Capitalist Society*, the state was to be explained as a sociological phenomenon whereby its machinery is used by the ruling elite to protect and gain its riches from the working class.¹⁸ Poulantzas, in contrast, argued that socialist transformation involves two parallel processes, a parliamentary campaign combined with the development of self-management towards 'democratic socialism':

... how is it possible to radically transform the State in such a manner that the extension and deepening of political freedoms and the institutions of representative democracy (which were also a conquest of the popular masses) are combined with the unfurling of forms of direct democracy and the mushrooming of self-management bodies?¹⁹

The political formation of this coexistence, however, remained obscure, 'the answer to such questions does not yet exist – not even as a model theoretically guaranteed in some holy text or other'.²⁰ In advocating this stance, Poulantzas had adopted the Althusserian position of the post-1968 French Communist Party (PCF), which had made an ideological shift and dropped the Marxist concept of the 'dictatorship of the proletariat' in the development of its 'Eurocommunist' outlook. This position, anti-Stalinist in intent, was

rooted in the proposition that all attempts to construct workers' direct control over the state would lead to despotism:

If we base everything on direct, rank-and-file democracy ... sooner or later, (it) inevitably leads to statist despotism or the dictatorship of experts ... if workers' councils form their own state power ... it is not the withering away of the State or the triumph of direct democracy that eventually emerges, but a new type of authoritarian dictatorship.²¹

In later years, an echo of these debates can be found in writings inspired by the Latin American 'Pink Tide'. From an earlier anarchist perspective, Hahnel and Albert and Albert introduce the concept of 'participatory economics', or 'Parecon', as politico-economic alternatives to both capitalism and 'co-ordinationism', or rather Communist command economy planning.²² Participatory economics presents a programme for which the constraints and disciplines of the market may be overcome by an alternative framework of indicative pricing and negotiated planning 'from below'. Transformation is seen as something which *gradually evolves* rather than something which challenges capital and state power directly in a historical moment of confrontation. This 'long march' emphasises 'councils of workers and consumers' as intermediary institutions.²³ The prescribed process of emancipation or liberation echoes John Holloway's 'Open Marxist' critique of classical Marxism to 'change the world without taking power'.²⁴ He argues that the society we should aspire to should be a product of neither the reformist nor revolutionary tradition of assuming power but should instead be a 'non-power' society, of which the central defining feature is a system of direct rather than representative democracy 'where power relations are dissolved'. The question of state power is deliberately left open in favour of a constant process of self-education: 'You cannot build a society of non-power relations by conquering power.'²⁵ This voluntaristic and *anti-state* position, on closer reading, also downplays class as the central focus of transformation. Holloway argues, for example, that: 'Social discontent today tends to be expressed far more diffusely, through participation in non-governmental organisations ... through the individual or collective concerns of teachers, doctors or other workers ... (and) in the development of autonomous community projects of all sorts.'²⁶

Lebowitz, too, has stretched the analyses of state power by differentiating between the state in its form of 'vanguard Marxism' – equivalent to the Stalinised command economies – and the conditions necessary for the development of a 'genuine Marxist socialism' from below.²⁷ In these interpretations, the state is continually viewed with suspicion, a potentially hostile force regardless of its relationship to capital or its leaders' ideological orientation. So for Holloway the possibility even of a 'workers' state' is viewed with equal hostility, an oxymoron which is 'absolutely absurd'.²⁸

Endogenous or exogenous?

The development of workers' councils in 1918/1919 Germany, the *soviets* in revolutionary Russia or the *cordones* in 1970s Chile may be seen as cases whereby worker cooperation and solidarity emerged *endogenously* as an ideological expression of emerging revolutionary class struggle and consciousness among workers. In contrast, the key driver for the worker occupations of factories in Britain in the 1970s was an *exogenous* shock as British employers and state sought to restructure industry in the face of economic crisis and soaring inflation. The same might be true of the 'recovered factories' movement in Argentina, whereby the movement from below was initially a defensive reaction to job

loss,²⁹ albeit a reaction that ignited expressions and emerging ideologies of worker solidarity as it progressed. The relationship between the two processes is further conditioned by interplay within both productive and ideological forces. Structural interdependency between state and capital, whereby the state seeks to create an environment that is conducive for capital accumulation, will also temper state responses to self-management. Specificities will in turn, as Martinez Lucio suggests, reflect historically developed workplace/labour movement legacies, repertoires of protest, traditions and discourse which may even include ‘sabotage’ and direct action as a motivating force rather than participation and control.³⁰

We start first with an examination of Tito’s Yugoslavia, before shifting period to the contemporary examples from the ‘Pink Tide’ of Latin America.

Yugoslavia under Tito: a reverse trajectory?

Post-war Yugoslavia was a testament to the success of Tito’s Communist partisans in defeating the Axis occupation. Seizure of productive facilities was by military means, and enterprises were taken into state ownership *ex post facto*. The historic split between Stalin and Tito isolated the fledgling Yugoslavia from the Soviet Bloc. The split came in January 1948 when Tito stationed troops in Albania to provide help to the Communist partisans fighting in Greece. Stalin had promised the Allies that he would not support the fight for a Greek Communist government, and so this break of ‘discipline’ by Tito was a move too far. Stalin then insisted that the Yugoslav Communists should surrender foreign policy initiatives (including in the Balkans) to the Soviet Union. Following negotiations between Stalin and Yugoslavia’s emissary Milovan Đilas in Moscow, the Central Committee of the Yugoslav Communist Party rejected Stalin’s proposal on 1 March 1948.

The Yugoslav state

Tito characterised the Soviet Union in terms of an unhealthy relationship between party and state whereby ‘... the Party in the Soviet Union is becoming more and more bureaucratic and is growing to be part and parcel of the bureaucratic state apparatus, becoming identified with it, and simply a part of it’.³¹ Đilas denounced the Soviet Union as ‘state capitalist’, inferring that a counter-revolution had taken place under Stalin within the socialist motherland.³² However, in terms of overall policy, Tito had expressed no previous preference for anything other than the orthodox Stalinist position. He became General Secretary of the Yugoslav CP in 1937, at the height of the Moscow Trials, and his Government after 1945 was built on Stalinist principles of one-party rule, the development of a leader-cult and ‘socialism in one country’.³³ The Government’s economic and political programme included major elements of the Stalinist command model. Ministries determined output and prices with emphasis on capital accumulation rather than consumption. The command structure of the partisan army was carried over into everyday life and social organisation. In the process, a privileged *nomenklatura* was confirmed (graphically described by Đilas).³⁴ As in other Stalinist states, there was no legal right to strike.

It is in this context that the party leadership under Tito developed the theory and practice of self-management (*samoupravljanje*). The ideology was framed by the Slovenian intellectual and party leader Edvard Kardelj alongside Đilas and Boris Kidrič

and enacted by the Government in 1950. As reported in *The Programme of the League of Yugoslav Communists*:

Our own experience, and that of other socialist countries, has shown that when the management of the economy is exclusively in the hands of the State machinery, the inevitable result is a growing tendency towards greater centralisation of power and closer amalgamation of State and Party machinery: they grow stronger and strive to divorce themselves from society and impose their power upon it³⁵.

Self-management, in Tito's vision, was intended to fulfil the dual role of debureaucratisation of the state by limited decentralisation of decision-making, whilst raising the consciousness of the peasant to that necessary for an industrial worker.³⁶ The contradiction between command economy Stalinism and debureaucratisation unfolded with the reality of practice. The combination of Tito's two political aims suggests that self-management was in fact a *modernisation* project, necessary to enable capital accumulation within the new state. Tito also foresaw self-management as a vehicle for a *disciplining* force on workers in the enterprise:

The role of the trade unions under the new conditions where the working people are taking part in the management is somewhat altered ... The work of trade unions will also be eased by the fact of the workers becoming acquainted with the process of management of production ... In any case, this will contribute a great deal to the stabilisation of work discipline in the factories, mines and other enterprises.³⁷

An *ideological* assertion was inculcated from within the Communist state leadership that workers' councils represent a harmony of interests within the enterprise.³⁸ This assertion flowed from the consideration that, as private property was abolished, there should be no conflict of interest between workers, management of enterprises and the (workers') state. In concrete terms, the purposes of self-management were referred to by Tito as they were expressed in Article 27 of the Bill on the Participation of Working Collectives. The management board of the factory, elected by the enterprise Workers' Council:

... undertakes steps to improve the production of the enterprise, especially with regards to the rationalisation of production; increasing labour productivity; lowering the costs of production; improving the quality of the products; decreasing waste; makes decisions on work norms in the enterprise ...

The emphasis was thus on self-management of an enterprise to increase its internal efficiency, to improve quality and to impose discipline. The market orientation of the project would fulfil the purpose of allowing Yugoslav industry to trade with the west, given its new-found isolation from the Soviet Bloc.³⁹

A reverse trajectory?

A second feature of self-management was the relationship with the market. This market relationship in turn fed ambiguity over the role of ordinary workers in the decision-making structure of the enterprise. This contradiction emerged in 1957 when the regime was shaken by a strike in the coal mines at Trbovlje. The strike's significance was that it presented an alternative way forward for ordinary workers to achieve their goals of better living and working, and in doing so challenged the official ideology.⁴⁰ Partly in response, a law agreed that year gave more discretion to the Workers' Councils to determine how the 'social product' (i.e. profit) of individual enterprises might be distributed between investment and wages. A contemporaneous turn to foreign trade led to a period of capital

formation and the growth of the economy. Further reforms in 1965 were intended to liberalise the economy and provide a solution to the emerging crisis of corporate and national indebtedness. Banks were given the freedom to run along 'capitalist' lines and to invoke discretion when granting credit to individual enterprises. In 1969, another major strike took place among dock workers in Rijeka, and in 1973, 2000 workers took industrial action in the Zmaj factory in Belgrade.⁴¹ Strikes once again developed towards the end of the 1980s when they were finally legalised.⁴² The country's economic problems, this time that of a rapid rise in the rate of inflation to 150%, were once again met by more market liberalisation.

The majority of strikes were about pay and were short-lived as most factory 'managers/directors' (appointed or elected by the Workers' Councils) quickly conceded to the workers' demands. Basic wage levels were set within centrally fixed limits, but enterprises were free to establish top-up bonuses, and in this fashion the role of the centre was confirmed. Unofficial strikes exposed an underlying division between state, party and enterprise management (the self-management 'class'), and rank-and-file workers. Indeed, Lane reviewed the evidence of decision-making structures in Yugoslavia at the time and concluded that 'Studies which have examined the participation of various groups (*in Yugoslavia*) also show that the workers' council is not the source of effective power in the enterprise.'⁴³ A hierarchy of power and authority existed with top management and party and union officials exhibiting most power, and workers through the workers' council being the least influential. Kolaja suggested that 'in both factories [studied] the workers' council fell under the influence of the Director who was also a prominent member of the League [of Communists] organisation'.⁴⁴ In 1967, the process of separation was deepened when firms were given the right to retain part of their foreign earnings from exports (thus releasing them from the obligation to cross-subsidise other firms through transfers of earnings via the central bank). Foreign-owned companies were allowed to invest in Yugoslavia, subject to a maximum 49% holding of assets. Such market liberalisation had the side effect of increasing unemployment as firms laid off workers in less profitable areas. The resultant unemployment acted to increase inequality among workers in general.⁴⁵

As Yugoslavia built bridges with western market capitalism, self-management proved useful in terms of enterprise innovation, worker discipline, control and direction. In effect, the pull of the market confirmed self-management as little different from the employee participation or 'industrial democracy' experiments in western capitalist enterprises. The reverse trajectory was consolidated in the process. As more powers to retain and redirect surplus were given to self-managed enterprises, so too were those enterprises forced into competition with one another and with those in the western markets. So whilst the state wished to enable self-management as a modernisation project, it contemporaneously imposed market discipline, thus negating the possibility of 'commons' as the logic of capital prevailed.

Argentina: a fragmented trajectory

Argentina's experiment with *autogestion* emerged during 2001 in the midst of economic and political crisis in which the government announced the largest sovereign debt default (\$93 billion) in world history. Social uprisings removed four presidents in two weeks. Millions of citizens began to participate in self-organised actions designed to reclaim control over the decisions that affected their daily lives, including neighbourhood

assemblies, pots and pans protests, *piquete* road blocks, community soup kitchens and barter clubs. An estimated 10,000 employees in over 160 factories, hotels, hospitals and other industries decided to restart the production process themselves by 'recovering' the workplaces that their bosses had abandoned.⁴⁶ Whilst participants in the worker-recovered companies (ERTs in Spanish) may not have possessed a clearly defined ideological agenda, self-management in Argentina did contain an expansive political edge inspired by the ideas of autonomy, removal of hierarchy and promotion of horizontal decision-making as the people demanded the removal of the entire political class.⁴⁷

Exogenous shock, endogenous movement

Workers' self-management has been interpreted as a defensive response by non-unionised employees to preserve their jobs motivated by the desire to confront the injustice of having remained unpaid for many months.⁴⁸ Alternatively, it has been presented as evidence of *anti-power* signalled by the recovery of autonomous spaces left by the abandonment of both the state and the traditional reformist agents of political parties and trade unions. Most workers felt betrayed by the Confederación General del Trabajo (CGT) - Argentina's only legally recognised union confederation, because it had used its corporatist prerogative within the Peronist government to tacitly support structural adjustment. The more pluralist Central de Trabajadores de la Argentina (CTA) confederation, established by dissident unions in 1992 and which opposed President Carlos Menem's neoliberal reforms, also appeared paralysed.⁴⁹ *Autogestion* was the product of the synthesis of two contradictory processes – on the one hand as a *collectivist* class response to defend jobs, and on the other an *individualist* 'save yourself' mentality which had been inculcated in workers' minds as part of a decade of aggressive neoliberal reforms under President Menem during the 1990s. The movement allowed workers to engage in a political project that sought workers' control through the National Movement of Recovered Companies (MNER).

Role of the state

Under President Duhalde, support for recovered factories was limited only to those ERTs viewed as his political allies.⁵⁰ This changed in May 2003 with the election of President Nestor Kirchner, who was voted in on a populist, left-leaning Peronist ticket. He legitimised the existing ERTs through the introduction of favourable microeconomic policies.⁵¹ The state's broadly supportive position can be explained because of the professed 'National-Popular' objectives of *Kirchnerismo*. Supporting *autogestion* helped to give credence to the government's narrative against neoliberalism and evoked the populist imaginary of Juan Peron whilst also distancing itself from more recent neoliberal variants of Peronism, in particular that of Menem in the years preceding it. However, in reality *Kirchnerismo* helped to embed the Argentine economy in global capitalism and reproduced an unequal class structure.⁵² The policies since enacted have been used as tools to depoliticise the movement through the process of institutionalisation. The 2004 Programme for Self Managed Work (PTA) provides subsidies to the ERTs, and in this way the political goals of the movement have been exchanged for the recognition of their practical aspirations.⁵³ The Kirchner government also launched social projects (*Planes*) that have led to the creation of some 13,000 state-sponsored cooperatives which employ 300,000 previously unemployed citizens.⁵⁴ However, within these cooperatives, workers'

control is more limited than in the ERTs as they are run by administrative councils rather than workers' assemblies and are heavily reliant on state patronage.⁵⁵

The attempted containment of autonomous movements confirms the Kirchners' desire for the restoration of a 'normal capitalism' after the crisis, and also exemplifies a return to traditional segmented neocorporatist practices of social control as have been historically favoured by Peronist governments.⁵⁶ Further, at no point has the existence of the ERTs fundamentally challenged the capitalist nature of property relations, largely because managers and owners abandon their factories and cease production before the workers move in, rather than being directly removed by them. In over a decade since the birth of the movement, only 12% of recovered companies have been granted permanent legal expropriation, whilst the remainder possess some form of temporary status.⁵⁷ The absence of a direct challenge to capitalist property relations helps to explain why the national state has been broadly supportive of the worker-recovered companies' movement in Argentina and has preferred to co-opt and contain it rather than resort to physical repression to crush it. The state's ambiguous role has also been demonstrated by its failure to adequately support self-managed enterprises in terms of marketing their products.⁵⁸

Finally, the National Institute for Co-operativism and Social Economy (INAES) has helped to incorporate and normalise the radical goals of many of the recovered companies. In 2003, divisions over political strategies caused the movement's national coordinating body, the MNER, to splinter and the rival National Movement for Worker-Recovered Factories (MNFRT) was founded in an attempt to move away from the MNER's preferred strategy of using direct confrontation and street mobilisations to further its goals.⁵⁹ In this sense, it can be said that Argentina's self-management project was established 'from below', but during the last decade has largely been assimilated, demobilised and co-opted 'from above'.

A fragmented trajectory

Most of the original ERTs have thrived since 2001 and workers' self-management expanded from 161 to 205 workplaces.⁶⁰ This has occurred in the face of enormous legal, financial and operational hurdles such as being saddled with the failed enterprises' debts, broken machinery and legal precariousness. For many individual ERTs, this has only been possible because they have pragmatically sought to succumb to legal institutionalisation in order to gain tax advantages and access to credit whilst simultaneously pursuing defiant acts of resistance that break with the logic of capital.⁶¹

For example, despite the legal requirement as companies with 'cooperative' status to implement managerial hierarchies, the authenticity of workers' control has largely been preserved, with 88% of ERTs regularly staging workers' assemblies as their sovereign decision-making body. However, in terms of a 'labour commons', the recovered companies have had little choice but to integrate into the market. Creating jobs has remained a priority, with four-fifths of such enterprises having added to their workforce in recent years.⁶² Whilst a large number of traditionally organised Argentinean factories executed a wave of redundancies when output fell during 2009, in the equivalent ERTs, workers collectively decided to prioritise the protection of jobs and reduce working hours, lower production or cut their salaries.⁶³ Although debates exist about whether or not workers are submitting themselves to the practice of self-exploitation,⁶⁴ favourable interpretations are that the ERTs are proactively challenging the circuit of capital.

For example, FaSinPat ceramics factory in Neuquén has increased its workforce by 85% since 2001 (www.obrerosdezanon.com.ar, accessed July 2, 2012). Half of all ERTs pay all their workers an equal ‘wage’, whilst two-thirds insist on an equal length for the working day. Where wage differentials do exist, they are largely marginal and symbolic.⁶⁵ Workers now receive higher rates of remuneration than they do in equivalent traditionally organised companies.⁶⁶ FaSinPat is involved in supporting several social projects in the local community. It not only donates its tiles to nearby community centres and hospitals but has also built a complementary health clinic in a poor local neighbourhood (www.obrerosdezanon.com.ar, accessed July 2, 2012).

Finally, whilst much of the workers’ self-management movement has been at least partially co-opted by the state, those elements which have resisted neocorporatist containment offer a counter-hegemonic alternative and a direct challenge to market-based capitalism. The *Red Gráfica* is an initiative that brings together 15 cooperatives (11 of which are ERTs) at different points in the supply chain of the printing and design industry. It is successfully neutralising market competition in its industry by each cooperative sharing resources and expertise, negotiating favourable terms with suppliers or by arranging closed-shop supply or bulk-purchase agreements with other network members.⁶⁷ This process of exerting collective control over certain productive sectors reflects the organisational evolution of the recovered companies’ movement and has also arisen as a response to its ideological fracturing and the frustrated attempts of its various national umbrella networks to coalesce around the same political project. Other examples are now starting to emerge in different industries,⁶⁸ and although relatively small scale, they illustrate that the social logic that facilitates productive links between recovered companies requires not only techno-productive needs but also a measure of political will. ERTs have succumbed to varying degrees of state co-optation since 2001, so their trajectory can be described as ‘fragmented’. Many currently exist ‘as islands of socialism in a sea of capitalism’, but they have at least built a number of bridges to link them over troubled waters.

Venezuela: endogenous development?

Workers’ self-management in Venezuela emerged as a top-down process, as part of the Bolivarian Revolution initiated by Hugo Chávez in 1998–1999. This process, renamed twenty-first Century Socialism in 2005, has been funded by booming oil revenues.⁶⁹ The state is the nations’ landlord, which means that it ‘can charge a royalty to international oil capital to produce on its subsoil’.⁷⁰ Historically, a fusion had taken place between the economic and political domains, which allowed the development of a rentier capitalist class, most notably managers from the state enterprise Petroleos de Venezuela, S.A. (PDVSA).⁷¹ To maintain social peace, the state redistributed a fraction of oil revenues to the middle class and to a lesser extent the working class through social programmes.

The Chávez state

This pact between PDVSA and the state exploded in the early 1980s with the rise of external debt and falling oil revenues, alongside the exhaustion of the redistributive system. PDVSA produced as much oil as possible, opened itself up to foreign capital and escaped taxation through creative accounting.⁷² There was no longer a political commitment to reinvest oil revenues in the social economy. It was in this context that

Hugo Chávez, a military man of humble origins, attempted a coup in 1992. Although the coup failed, Chávez became a symbol for the oppressed. When he became president in 1998, he inherited a deeply impoverished and highly polarised country. Chávez had no real distinctive political agenda, apart from the promise to break away from neoliberal policies and to place human needs at the heart of all economic activities.

There were three distinct phases in the ensuing political reform process. In the first phase (1998–2003), market relations were kept in place.⁷³ The government's priority was to stabilise the social and economic situation through the Plan Bolívar 2000 (directly managed by the armed forces). When Chávez was elected, the price of oil had hit a low point, further undermining the economy. In 2000, Chávez persuaded Organization of the Petroleum Exporting Countries members to abide by their quotas.⁷⁴ The government then promoted a mixed economic model where cooperatives and small family businesses could coexist with privately controlled circuits of production and distribution. The creation of cooperatives was seen as a key instrument for achieving a transition to an endogenous model of economic development based on the satisfaction of human needs in the community.

Endogenous development?

In the second phase (2002–2005), the Bolivarian Revolution became radicalised. It became clear that the political opposition, supported by the employers association FEDECAMARAS, the Confederación de Trabajadores de Venezuela (CTV) and PDVSA, would do everything in their power to force Chávez out. The government response was to take a more anti-business stance. Chávez announced that 1149 enterprises were to be expropriated. In the event, the government did not implement a systematic expropriation policy. Moreover, the Venezuelan labour movement did not demonstrate a strong capacity to occupy expropriated factories, in contrast to its Argentinean counterpart.

Crucially, the government wanted to keep direct control of the strategic sectors of the economy, especially the oil industry, PDVSA. As a result, the government resisted workers' calls for self-management and repossession, arguing that it needed to grant special status to the organisation because of its strategic importance.⁷⁵ 2005 was also a crucial year in that the government openly declared its commitment to twenty-first Century Socialism, by which they meant the participation in the decision-making process of excluded or semi-excluded sectors of the population as opposed to the traditional working class.⁷⁶ For Chávez, what mattered was not the form of property relations, but whether enterprises reinvested their resources in the community for social needs. In this socio-productive model, social enterprises (*empresas de producción social*, EPS) were meant to lead to the adoption of 'socialism of the 21st century', by opposition to the socialism of the twentieth century as experimented by the Soviet Union (a model of state capitalism) or workers' self-management in Yugoslavia.⁷⁷

A key element of the emergency response to the economic and social crisis of 2002–2003 was the creation of the Missions. The Missions, *Barrio Adentro* and *Mercal*, for example, were originally set up in the municipality of Caracas to attend to health and alimentation needs. In February 2003, the city asked the Cuban government to send Cuban doctors to deprived neighbourhoods, the *barrios*. The programme was piloted and then rolled out nationally. The Mission *Mercal* provided subsidised food in government-sponsored cooperatives. From 2004, the government used the massive windfall in oil revenues to fund the expansion of the Missions by creating a mission each time it identified

a new social need. In the Mission *Vuelvan Caras*, the aim was to create a model of endogenous development based on local socio-economic projects. The contours of the whole project can be defined by six principles and objectives: the state should assume a proactive role in the economy through the nationalisation of strategic industries; economic development should be endogenous; the state should promote participatory democracy through Communal Councils; civic engagement of the people in the revolutionary process; market-led mechanisms should ultimately disappear and be replaced by alternative forms of social relations based on the socialisation of revenues; and finally, new values of altruism, solidarity and social utility of work should be promoted as an alternative to consumerism and individualism.

The development of the Bolivarian Revolution can thus be analysed as an initial counteraction against an endogenous political threat in 2002/2003. The political mobilisation of socially excluded people was crucial for the survival of the Presidency, leading to a war of position between pro- and anti-Chavistas. During the presidential re-elections of 2006, Chávez asserted the socialist character of the Bolivarian Revolution, which was later confirmed in the 2007–2013 Plan. Booming oil prices led to an increase in rent revenues and enabled the government to experiment its vision of twenty-first century socialism on a large scale.

The last and third period (2007–2010) consisted in an acceleration of the radicalisation process. As usual, the president attempted to regain the political ground by launching a series of initiatives. First, confronted with a phenomenon of massive desertion in the Mission *Vuelvan Caras*, the government officially replaced it with the Mission *Che Guevara* in 2007. This corresponded to an official recognition of the failure of the cooperatives on the grounds that they were not conducive to socialism. Second, in 2007–2008 the Chavista government expropriated strategic sectors including electricity, steel, cement and telecommunications.⁷⁸

There had been a substantial increase in the number of registered cooperatives, from 400 before 1998 to 131,050 in 2006. It must be noted, however, that 60–70% of these registered cooperatives are in fact not economically active.⁷⁹ Initially, the development of cooperatives corresponded to massive job creation programmes through the injection of microcredits in the local economy. Left to their own devices, a sizeable majority of these cooperatives and endogenous development projects would simply not survive. Cooperative members often lack administrative and technical skills and are unable to compete with their capitalist counterparts, even with the massive injection of microcredit.⁸⁰ There is a strong element of window dressing for microdevelopment projects which, on closer inspection, are the functional equivalent of occupational welfare programmes.⁸¹ According to a representative of the Direction of Cooperatives (SUNACOP), the real purpose of the cooperatives is not to increase national production and to diversify the economy, but to give local people a sense of purpose and a job, consistent with the Marxist perspective that underlines the ‘Bolivarian revolution’:

Cooperatives represent a new way of life, a means to improving people’s living standards, a way of giving people a job full of dignity and exempt of exploitation.⁸²

The official explanation from senior government officials for the failure of *Vuelvan Caras* is that individuals were motivated by ‘greed’, as they received a monthly allocation to be part of the programme or microcredits. This moral argument served to justify the official

rejection of *Vuelvan Caras* and its replacement by the Mission *Che Guevara*. In fact, the cooperatives faced tremendous difficulties in getting access to circuits of distribution controlled by big corporations.⁸³ The constitution of cooperatives reflected a culture of amateurism both on the participants' and the government's side.⁸⁴ In addition, a phenomenon of massive desertion occurred as a result of irregularities in the payment of the monthly allowances. From 2005, approximately 15,000 students quit the Mission. One interviewee explained in this respect:

From 2005-2006 we witnessed a movement of massive desertion. Field work studies showed that people became tired, especially as they had to deal with inefficiency in public administration and implementation.⁸⁵

Finally, as Hintze suggests, the programme suffered from a lack of continuity in terms of political orientations, especially as there was a high degree of turnover at the executive level.⁸⁶ This process of permanent change became a clear obstacle to programme consolidation, and as Webber records, 'conservative, bureaucratic layers within *Chavismo* have taken on an important role within the state apparatus and have hampered a transition to socialism'.⁸⁷

Conclusion

In this article, we have sought to explore the relationship between the state and movements for self-management and workers' control. In doing so, we have located our analysis in contemporaneous political economy, noting a spectrum of self-management in practice and a trajectory of development (or retreat). The state, far from having a neutral or passive role, has sought to shape developments, either to reinforce, to contain, or to obstruct. In this respect, the model of state facilitation–repression of movements from below has been evident, as states seek to cope with the challenge of self-management by creating processes of institutionalisation of conflict which act to blunt the radical nature of the project and deflect it into less challenging forms. This is especially true at our key points of our spectrum when (capitalist) property relations are threatened or when the circuit of capital is fractured or interrupted. In such instances, the role of the state cannot be ignored or reduced to a 'non-power' position whereby the question of state power and the manufacture of ideology based on state power is sidestepped.

In Argentina, the movement of recovered factories was initially spurred by a defensive reaction to an acute financial and industrial crisis firmly located within neoliberal prescriptive restructuring. Following the exogenous shock, an endogenous movement developed which began to exploit potential fissures in the circuit of capital in a progressive direction along our spectrum, often creating alternatives to the logic of capital. Forms of participatory democracy began to take centre stage, circuits of capital were fractured through the establishment of 'commons' and the theoretical debate between state and 'non-state' power coagulated. However, the momentum for transformation was subsequently blocked, and the circuit of capital restored, as the neo-Peronist Kirchner governments incorporated the movement from below by legislation designed to normalise capitalist property relations. Alternative forms of cooperative projects were facilitated by the state which blunted the ideological challenge of the movement from below. In effect, the role of the state appeared crucial in slowing down and fragmenting the trajectory.

In Venezuela, we see a more complex arrangement between state and movement locked into the peculiarities and specificities of the 'Bolivarian' revolution. The state has played an active role in encouraging and shaping endogenous projects designed to both modernise industry and to raise consciousness among the masses. However, the project appears stalled by a lack of 'real' self-determination, and is in effect an 'exogenously produced endogeneity' prone to the risk of failure, and became increasingly conditioned by a burgeoning Chavista conservative bureaucracy. Moreover, in the context of a politically volatile situation after the close victory of Hugo Chávez's successor Maduro, a difficult domestic issue is the extent to which oil revenues can continue to sustain the Bolivarian Revolution and its string of social programmes. Whilst formally at the progressive end of our spectrum, the lack of socialist experimentation from below acts as a brake on socialist transformation.

In comparing our Latin American examples to cold war Yugoslavia, we see a reverse trajectory of movement in Yugoslavia away from socialised production to the primacy of the market. The Titoist state had constructed self-management as a process of decentralisation from above in its early years not only to distance itself from the Soviet alternative but also as a modernisation and disciplining project on a small but growing proletariat. The weaknesses of self-management were contained in the contradictions between top-down authority, still in the Stalinist mode, and a developing class-based divide within the enterprise that denuded self-management of any radical edge. The strategy of survival chosen by the Yugoslav state within the world economy was to introduce market principles into self-managed enterprises, eventually restoring the (capitalist) circuit of capital and full capitalist property relations in post-Tito times. We see in the Chavista self-management and worker cooperative apparatus an emerging bureaucracy that has echoes of the Yugoslav self-management class. The 'turn to the market' was a strategic choice of the Yugoslav state leadership, restricting and containing the opportunities for 'commons' in much the same way as the Argentinian state has operated in contemporary times.

In all three cases, the state has actively intervened to shape or reshape processes of self-management as part of a strategic choice to reconstitute the nature of the state in the interests of capital accumulation. The state's adjustment to wider political economy has in such fashion played a crucial role in determining the trajectory and position on the spectrum of self-management. Our survey would suggest a defining, rather than marginal role for the state.

This is not to say that self-management cannot offer a transformative vision towards full workers' control and socialised production. Workers' control over production remains the key test of transformative projects towards socialism. Our point is that this vision cannot be understood in isolation from an understanding of the nature of the state, and neither can it be accomplished without facing the realities of state power and wider political economy.

Notes on contributors

Martin Upchurch is Professor of International Employment Relations at Middlesex University, London, UK. He is co-author of *The Crisis of Social Democratic Trade Unionism in Western Europe* (Ashgate, 2009) and *Workers and Revolution in Serbia* (Manchester University Press, 2013).

Anne Daguerre is a Reader in the Department of Leadership, Work and Organisation at Middlesex University Business School in London. She has published extensively on welfare reform in

comparative perspective. In December 2012, she completed a British Academy research project entitled 'The Social Missions in Venezuela under the Presidency of Hugo Chavez: Between Ruptures and Continuities'.

Daniel Ozarow is a Lecturer in the Department of Leadership, Work and Organisation at Middlesex University Business School in London. His Ph.D focused on middle-class responses to impoverishment and participation in social movements during Argentina's economic crisis of 2001 and is co-Chair of the Argentina Research Network UK.

Notes

1. [Ness and Azzellini](#), *Ours to Master and Own*.
2. [Tilly](#), *From Mobilisation to Revolution*.
3. [Grebing](#), *History of the German Revolution*.
4. [De Peuter and Dyer-Witheford](#), "Commons and Co-Operatives," 13.
5. Research interviews and surveys were carried out in Venezuela with funding from the British Academy.
6. [Lebowitz](#), *Build It Now*.
7. [Ramsay](#), "Cycles of Control."
8. [Bonnet](#), "The Political Form At Last Discovered," 66.
9. [De Peuter and Dyer-Witheford](#), "Commons and Co-Operatives," 13.
10. Cited in [Lebowitz](#), *Build It Now*, 89.
11. [Luxemburg](#), "Co-Operatives, Unions, Democracy."
12. [Marx](#), *Capital*, 440.
13. [Luxemburg](#), "Co-Operatives, Unions, Democracy."
14. See [Tuckman](#), *Industrial Action and Hegemony*; [Darlington and Lyddon](#), *Glorious Summer*.
15. [Hyman](#), "Workers' Control and Revolutionary Theory."
16. [Coates and Topham](#), *The New Unionism*.
17. [Hyman](#), "Workers' Control and Revolutionary Theory," 249–50.
18. [Miliband](#), *The State in Capitalist Society*.
19. [Poulantzas](#), *State, Power, Socialism*.
20. *Ibid.*, 264–5.
21. *Ibid.*, 255, 264.
22. [Hahnel and Albert](#), *Looking Forward*; [Albert](#), *Parecon: Life After Capitalism*.
23. [Hahnel and Albert](#), *Looking Forward*.
24. [Holloway](#), *Change the World*, x–xii.
25. *Ibid.*, 17.
26. *Ibid.*, 21.
27. [Lebowitz](#), *The Contradictions of 'Real Socialism'*.
28. [Callinicos and Holloway](#), "Debate."
29. [Monteagudo](#), "The Clean Walls of a Recovered Factory."
30. [Martinez Lucio](#), "From Action to Communication," 657.
31. [Tito](#), *Workers Manage Factories in Yugoslavia*, 14.
32. Cited in [Swain and Swain](#), *Eastern Europe Since 1945*, 73.
33. [Dilas](#), *Conversations with Stalin*, 14.
34. [Dilas](#), *The New Class*.
35. Cited in [Lane](#), *The Socialist Industrial Estate*, 21.
36. [Upchurch and Marinković](#), *Workers and Revolution in Serbia*.
37. [Tito](#), *Workers Manage Factories in Yugoslavia*.
38. [Riddell](#), "Social Self-Government."
39. [Lydall](#), *Yugoslav Socialism: Theory and Practice*, 67.
40. [Marinković](#), *Strajkovi i drustvena kriza*.
41. [Shabad](#), "Strikes in Yugoslavia."
42. [USDS](#), *Country Reports on Human Rights Practices*.
43. [Lane](#), *The Socialist Industrial Estate*, 152.
44. [Kolaja](#), *Workers' Councils: The Yugoslav Experience*.
45. [Lydall](#), *Yugoslav Socialism: Theory and Practice*, 84.

46. Monteagudo, "The Clean Walls of a Recovered Factory."
47. Atzeni and Ghigliani, "Labour Process and Decision-Making"; Dinerstein, "Workers' Factory Takeovers," 530.
48. Monteagudo, "The Clean Walls of a Recovered Factory."
49. Serdar, "Strategies for Revitalizing Labour Movements."
50. Rebón, *Desobedeciendo al Desempleo*.
51. Svampa, "Las fronteras del gobierno de Kirchner."
52. Wylde, "State, Society and Markets."
53. Dinerstein, "Workers' Factory Takeovers," 530.
54. Silveira, "Argentina: Worker Cooperatives Rehabilitate."
55. Orgaz, "Cooperativas de trabajo y empresas recuperadas."
56. Etchemendy and Collier, "Down but Not Out."
57. Facultad Abierta, *Las Empresas Recuperadas en la Argentina*.
58. Svampa, "Las fronteras del gobierno de Kirchner."
59. Ranis, "Argentina's Worker-Occupied Factories."
60. Facultad Abierta, *Las Empresas Recuperadas en la Argentina*.
61. Ranis, "Argentina's Worker-Occupied Factories."
62. Facultad Abierta, *Las Empresas Recuperadas en la Argentina*.
63. Magnani, "2001/2011: Una década recuperada."
64. Heller, *Fábricas Ocupadas*.
65. Facultad Abierta, *Las Empresas Recuperadas en la Argentina*.
66. Magnani, "2001/2011: Una década recuperada."
67. Giuffrida, "Noticias cooperativas."
68. La Vaca, "Fábricas y empresas sin patrón."
69. Karl, *The Paradox of Plenty*.
70. Purcell, "The Political Economy."
71. Coronil, *The Magical State*.
72. Hammond, "The Resource Curse and Oil."
73. Lebowitz, *Build It Now*.
74. Hammond, "The Resource Curse and Oil," 365.
75. Azzelini, "Economía solidaria e formas," 13.
76. Ellner, "The Distinguishing Features."
77. Alvarez, *Venezuela: hacia donde va el modelo productivo?*
78. Ellner, "The Distinguishing Features," 111.
79. Hintze, La política es un arma cargada, 96.
80. Piñero, "Main Challenges for Cooperatives."
81. Hintze, *La construcción de la economía*; Piñero, "Main Challenges for Cooperatives."
82. Interview with a representative of the direction of cooperatives, SUNACOO, Caracas, September 2008.
83. D'Elia and Cabezas, *Las Misiones Sociales en Venezuela*, 76.
84. Ibid.
85. Interview with Professor Hector Constant, *Instituto de Altos Estudios Diplomáticos*, Caracas, September 2008.
86. Hintze, *La construcción de la economía*.
87. Webber, "Venezuela Under Chavez," 176.

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