

Global Labour History: Two Essays

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Marcel van der Linden



V.V. Giri National Labour Institute

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Preface

The Integrated Labour History Research Programme, a collaborative professional endeavour of V.V. Giri National Labour Institute and Association of Indian Labour Historians was initiated in July 1998 with the objective of initiating, integrating and reviving historical research on labour history. The programme has now emerged as one of the most important professional activities related to labour history globally. The programme has three mutually reinforcing components: Digital Archives of Indian Labour; Writing Labour History; Interdisciplinary research. Leading scholars and practitioners have contributed their research papers as a part of the Writing Labour History component. The research paper, *Global Labour History: Two Essays* by Marcel van der Linden is one of the most recent and important contributions in this regard.

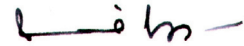
Professor Marcel van der Linden has been a leading proponent of the 'global turn' in labour history consistently arguing against the dominant Eurocentric conception of historical trajectory of labour. According to this dominant narrative 'free' labour has been a sine-qua-non of modern capitalist world order and has been at the heart of the industrial revolution that transformed the world. The system of free wage labour based capitalism, it was argued, spread from its centre in Europe to the so-called underdeveloped countries. Overtime, 'free wage labour' system was consolidated with the 'free' labourers and their trade unions and political parties representing them acquiring a significant say in the political formations of advanced capitalist countries. This trajectory culminated with the creation of the Welfare State. This Eurocentric account of free labour based capitalism was shared by scholars at different positions in the ideological spectrum such as Karl Marx and Max Weber. Against this Eurocentric narrative of free labour, Marcel van der Linden posits a Global History counter narrative. Three key points of this counter narrative are :

- a) The crucial role of 'unfree labour' and slavery in developing capitalism thereby dissolving the conceptual link between free labour and capitalism;
- b) Origin of capitalism is not to be found in the European Centre but in its Colonial Periphery like in the British Caribbean Colonies where the seeds of capitalist organisation of production was laid out in the sugar plantations worked by African Slaves; and
- c) The dismantling of the welfare state has shown that in many ways precarious and informal work is no longer the preserve of the third world but is rapidly growing in the heart of the advanced capitalist core countries. In two interconnected essays Professor van der Linden is able to show that the history of the modern capitalist world order cannot be written solely as the triumphant march

of freedom of market and free wage labour emanating from an European Centre. Modern Capitalism developed by coopting and connecting various forms of unfree labour including slavery and unpaid labour forms such as women's labour in the household and care giving labour of all kinds are crucial in sustaining the modern labour systems. These two exemplary essays on global labour history both conceptually and empirically chart a new and more satisfying course for understanding the fate of labour in an increasingly interconnected world.

I would like to express our sincere appreciation to Prof. Marcel ven der Linden for this important professional contribution. In fact, we are privileged that Marcel ven der Linden, an indefatigable driving force of Global History of Labour, has been associated with the Integrated Labour History Research Programme ILHRP ever since its inception.

I sincerely hope that researchers and practitioners concerned with labour studies will find this article enriching and inspiring.



(Manish Kumar Gupta)

Director General

V.V. Giri National Labour Institute

Global Labour History: Two Essays

Marcel van der Linden

Since the late 1990s I have had the pleasure to attend various conferences held at the V.V. Giri National Labour Institute (VVGnLI). With great interest I have witnessed how the VVGnLI developed and professionalized during the last twenty years. I was particularly impressed by the wisdom of its administrators, who saw and see the relevance of historical studies for the understanding of contemporary labour problems. This is unambiguously revealed by VVGnLI's long-term support for the Association of Indian Labour Historians, and its involvement in the Archives of Indian Labour since its origin in 1998. VVGnLI's commitment to labour history was confirmed again a year ago when I proposed to hold the first conference of the Global Labour History Network (3-4 March 2017) at the Institute. The VVGnLI administration immediately declared its willingness to host this event, and to provide all necessary facilities. Subsequently, scholars from five continents enjoyed VVGnLI's fantastic hospitality, and this certainly contributed to the success of the conference.

The Global Labour History Network was founded in June 2015 in Barcelona. It has defined its mission as follows:

“The Global Labour History Network (GLHN) ... unites local, national and regional scholarly associations, journals, archives and museums, as well as committed individuals, who aspire to further the study of work and workers in the broadest sense. We are interested in paid and unpaid, free and unfree, productive and reproductive labour, in all areas of the globe and without temporal limitation. While our mandate includes modern rural and industrial workers such as miners, factory operatives, agricultural workers and dockers, it welcomes also those studying soldiers, domestic servants, sex workers, and caregivers. Unwaged labour, including slavery, indentured workers, debt peons, and homemakers are equally vital to our academic mandate.

The GLHN promotes research, the collection of data, the sharing and mobilization of knowledge, and the preservation of archives and other historical materials. The network encourages the formation of collaborative transcontinental working groups on topics such as, for example, free and unfree labour, gender, migration, colonial labour, trade unions, or other issues of wider relevance. The GLHN also envisages the organization of global conferences, as soon as resources make this possible.”

A central interest of the GLHN is the development of Global Labour History – a new approach to the study of work, workers and workers’ movements developed during the last two decades.¹ The following two interconnected short essays can be read as an introduction to this new field of historical research, which is encountering more and more interest in different parts of the world. The first essay (“Caribbean Radicals, a New Italian Saint, and a Feminist Challenge”) is the annotated version of a lecture I have given in Berlin, Cologne, Detroit and Reykjavik. The second essay (“Unfree Labour: the Training-ground for Modern Labour Management”) is a reworked version of an essay I previously published under a different title in the US journal *Labor History* (51, 4 (November 2010), pp. 509-522). I hope that the reader will find some inspiration here.

Amsterdam
March 8, 2017

¹ Marcel van der Linden and Jan Lucassen, *Prolegomena for a Global Labour History* (Amsterdam: International Institute of Social History, 1999), see <<https://socialhistory.org/en/publications/prolegomena-global-labour-history>>; Jan Lucassen (ed.), *Global Labour History: A State of the Art* (Bern: Peter Lang, 2006); Marcel van der Linden, *Workers of the World. Essays toward a Global Labor History* (Leiden and Boston: Brill, 2008; reprint Chicago: Haymarket, 2010).

1

CARIBBEAN RADICALS, A NEW ITALIAN SAINT AND A FEMINIST CHALLENGE

What is global labour history? To explain what I mean when I use this concept, allow me to share with you four short historical vignettes from my own research. They are stories taken from very different situations in different places in the world, but as I will try to show you, there is a connection between them anyhow.

Slaves and Capitalism

In September 1938, a doctoral dissertation was defended at the Faculty of Modern History of Oxford University, titled “The Economic Aspect of the Abolition of the British West Indian Slave Trade and Slavery.” Four years later, this thesis was also published as a book, called *Capitalism and Slavery*. The author was, of course, Eric Williams, who later became Prime Minister of Trinidad and Tobago. In *Capitalism and Slavery*, Williams referred to another milestone work published in 1938, by his countryman and onetime school teacher C.L.R. James: *The Black Jacobins. Toussaint L’Ouvverture and the San Domingo Revolution*.²

In 1932, James and Williams had both migrated from Trinidad to Britain – James went to work as writer and journalist, while Williams studied at Oxford. Later on, from 1958 to 1960, Williams and James were again working together. When Williams became prime minister of Trinidad and led the country to independence, James supported him for some time, among other things as chief editor of the newspaper *The Nation*.

Williams and James held very different political views, and their collaboration did not last. After a short while, they went their separate ways again.³ James subsequently developed more and more into a champion of total democracy, and interpreted Lenin’s idea that “every cook can govern” literally, while Williams sought a reapproachment with the United States, and in the end banned not only the distribution of the older publications by C.L.R. James, but also his own early writings! Whatever their later political differences though, it remains true that in 1938 both men shared

² Eric Williams, *Capitalism and Slavery* (Chapell Hill, NC: University of North Carolina Press, 1944); C.L.R. James, *The Black Jacobins. Toussaint L’Ouvverture and the San Domingo Revolution* (New York: The Dial Press, 1938).

³ A standard work is Ivar Oxaal, *Black Intellectuals Come to Power. The Rise of Creole Nationalism in Trinidad and Tobago* (Cambridge, MA: Schenkman Publishing Company, 1968).

the same historical perspective. James argued that the British campaign to abolish slavery and the slave trade should be explained with reference to 1) the dwindling profitability of sugar production in the British territories of the Caribbean, 2) the greater opportunities after the battle of Plassey to produce more cheaply in British India than in the Caribbean, and 3) the British desire to wipe out their French competitors. The argument in Williams's doctoral thesis was similar in some important respects. In the book version of *Capitalism and Slavery*, Williams explicitly admitted that James had stated the thesis which he had advanced in his own work "clearly and concisely and, as far as I know, for the first time in English".⁴

There has been controversy about the precise extent to which the arguments of James and Williams differed or converged. Whatever position we might take on this issue though, both authors endorsed the same basic idea. Both of them argued, explicitly or implicitly, that chattel slavery in the Caribbean was an important element in the growth of capitalism in Western Europe. The tropical plantations with their perverse system of exploitation and oppression, the capitalist putting-out systems and emerging factories formed *one transcontinental circuit*. Without saying as much, and possibly without fully realizing it, James and Williams had therefore abandoned the theory of Karl Marx. Marx had always assumed that the "doubly free" wage earner is the real and privileged basis of capitalist production, or in other words, that labour power can be commoditized in only *one* way that is "truly" capitalist, namely through free wage labour, in which the worker "as a free individual can dispose of his labour-power as his own commodity" and "has no other commodity for sale." Marx had emphasized that "labour-power can appear on the market as a commodity only if, and so far as, its possessor, the individual whose labour-power it is, offers it for sale or sells it as a commodity."⁵ Max Weber, the intelligent bourgeois anti-Marx, shared this opinion. Weber believed that the "purely voluntarist organization of labour" was typical for capitalism.⁶ In 1926, another kindred spirit, the conservative German sociologist Götz Briefs,

⁴ The addition „in English“ is relevant, because a similar idea had been articulated before by the German Franz Hochstetter, "Die wirtschaftlichen und politischen Motive für die Abschaffung des britischen Sklavenhandels im Jahre 1806/1807" [The Economic and Political Motives for the Abolition of the British Slave Trade in the Year 1806-1807], in: Gustav Schmoller and Max Sering (eds), *Staats- und sozialwissenschaftliche Forschungen*, 25 (1906), pp. V-X, 1-120. Hochstetter (1880-1948) became a Nazi in his later life. Williams referred extensively to Hochstetter in his unpublished doctoral thesis, but did not mention him in the book version of the thesis, probably for political reasons. See Eric Williams, *The Economic Aspect of the Abolition of the West Indian Slave Trade and Slavery*. Edited by Dale Tomich. Introduction by William Darity Jr. (Lanham, MD: Rowman & Littlefield, 2016).

⁵ Karl Marx, *Capital*, I, trans. Ben Fowkes (Harmondsworth: Penguin, 1976), p. 272.

⁶ Max Weber, *Wirtschaft und Gesellschaft*. Vollständiger Nachdruck der Erstausgabe von 1922 (Tübingen: J.C.B. Mohr/Paul Siebeck) 1972), p. 96.

defined the wage labourer as “personally free” and with “no property”, living in “economic circumstances in which means of subsistence can be obtained only through economic returns.”⁷

Contrary to Marx, Weber and other classical theorists, James and Williams considered chattel slaves as an integral element of capitalism. Thus, wage workers and chattel slaves both embodied a form of capitalist labour. The implication of this thought is, that there exists a large class of people within capitalism, whose labour power is commoditized in various *different* ways. In his *Grundrisse*, Marx declared that slavery is “an anomaly opposite the bourgeois system itself”, which is “possible at individual points within the bourgeois system of production”, but “only because it does not exist at other points.”⁸ The James/Williams approach goes much further: slavery is not a capitalist “anomaly”. It is part of capitalist *normality*. The world’s working class is, in reality, a variegated group, including chattel slaves, share-croppers, small artisans and wage earners. I think that it is the historical dynamics of this global “multitude” that labour historians should try to understand.

San Precario

Let me now take a leap in time. On 29 February 2004, Italy witnessed the ironic dedication of a new saint by the Chainworkers of Milan (an anarcho-syndicalist collective seeking to subvert commercial advertising): San Precario, the patron of the casual, temporary, freelance and intermittent workers.

San Precario was initially envisaged by his inventors as a man, but in the meantime has evolved into a rather androgynous being. He or she can appear anywhere and everywhere: on streets and squares, but also in McDonald’s outlets, supermarkets or bookstores.⁹ Prayers are directed to the new saint, such as:

Oh, Saint Precarious,
protector of us all, precarious of the earth,
Give us paid maternity leave,
Protect chain store workers, call center angels,

⁷ Goetz Briefs, “Das gewerbliche Proletariat”, in: *Grundriss der Sozialökonomik*, Part IX (Tübingen, J.C.B. Mohr, 1926), pp. 142-240, at 149. The *Grundriss der Sozialökonomik* was the Weimar Republic’s standard sociological reference work and included the original edition of Max Weber’s *Wirtschaft und Gesellschaft*.

⁸ Karl Marx, *Grundrisse. Foundations of the Critique of Political Economy (Rough Draft)*. Trans. Martin Nicolaus (Harmondsworth: Penguin, 1973), p. 464.

⁹ Marcello Tari and Ilaria Vanni, “On the Life and Deeds of San Precario, Patron Saint of the Precarious Workers and Lives”, *The Fibreculture Journal*, 5 (December 2005): <<http://five.fibreculturejournal.org>>.

and all flexible employees, hanging by a thread.
Give us paid leave, and pension contributions,
income and free services,
keep them from being fired.

Saint Precarious, defend us from the bottom of the network,
pray for us temporary and cognitive workers,
Extend to all the others our humble supplication.

Remember those souls whose contract is coming to an end,
tortured by the pagan divinities:
the Free Market and Flexibility,
those wandering uncertain, without a future nor a home,
with no pension nor dignity.
Grant hope to undocumented workers,
and bestow upon them joy and glory,
Until the end of time.

The arrival of Saint Precarious draws attention to a problem of burning actuality: the continuing increase of very vulnerable employees who must live and work without any security or predictability, in irregular jobs.

Usually we regard this troubling development with North-Atlantic eyes, and take a short-term perspective. We are used to assuming a Standard Employment Relationship as the ruling norm for working life.

Standard Employment is a form of wage labour defined by:

- continuity and stability of employment,
- a full-time position with one employer, only at the employer's place of business,
- an income that enables an employee to support at least a small family (the wage earner, a non-employed spouse, and one or two children), without falling below a basic standard of living,
- legally stipulated rights to protection and participation/codetermination at work, and
- social insurance benefits, often related to length of employment and the level of previously earned income.

In assuming all this, we ignore two things though. Firstly, we ignore that, even in the advanced capitalist countries, a Standard Employment arrangement is a relatively recent phenomenon. Insofar as wage labour existed throughout the history of civil society, it was actually for the most part casual labour. The New Testament, probably written around 200 AD, already narrates the parable of "a householder who went out early in the

morning to hire labourers for his vineyard” and who, “after agreeing with the labourers for a denarius a day... sent them into his vineyard.”¹⁰ Often, such day-labourers would have regarded their harvest labour only as an addition to income from other sources. When supplementary incomes were lacking, the condition of the working poor was often miserable.

Throughout history, pure wage-labourers were regarded as extremely disadvantaged. In the *Cahiers de doléances* (petitions written during the French revolution) the situation of the day-labourer (*journalier*) was usually defined as “a kind of hell into which peasants may fall if things are not bettered.”¹¹ And in post-medieval England, workers fully dependent on wages were assumed to be paupers; “only the weakest” would, according to Christopher Hill, accept this status.¹²

Only the highest strata of the working class could escape from the existential insecurity just described. Unsurprisingly, it was therefore in the circles of 19th century skilled labourers that the ideal of the “male breadwinner” (or the “family wage”) became popular – the idea that the wage of the husband should be sufficient to support a wife and small children. Already before 1939, but especially after the Second World War, when capitalist economies experienced unprecedented growth and when the expansion of social security became possible, a large part of the working classes in Western Europe, North America, Australasia and Japan obtained a Standard Employment Relationship. It was partly an effect of the recognition by large corporations that the creation of stable labour relations required “making long-term investments in employee good will” and giving up “short-run output and efficiency in favor of long-run stability and predictability.”¹³ This labour relationship was normally understood in a gendered way, and went together with the increasing acceptance of the male breadwinner model.¹⁴ And so a gendered division of labour tended

¹⁰ *Oxford Annotated Bible*, p. 1197 (Matthew 20).

¹¹ Sir John Clapham, *A Concise Economic History of Modern Britain from the Earliest Times to 1750* (Cambridge: at the University Press, 1951), p. 212.

¹² Christopher Hill, “Pottage for Freeborn Englishmen: Attitudes to Wage Labour in the Sixteenth and Seventeenth Centuries”, in: C.H. Feinstein (ed.), *Socialism, Capitalism and Economic Growth. Essays Presented to Maurice Dobb* (Cambridge: at the University Press, 1967), pp. 338-350, at 339.

¹³ Sanford M. Jacoby, *Employing Bureaucracy. Managers, Unions, and the Transformation of Work in American Industry, 1900-1945* (New York: Columbia University Press, 1985), p. 281.

¹⁴ See, among others, Angelique Janssens (ed.), *The Rise and Decline of the Male Breadwinner Family?* Supplement 5 of the *International Review of Social History* (1997); Birgit Pfau-Effinger, “Socio-historical Paths of the Male Breadwinner Model. An Explanation of Cross-national Differences”, *British Journal of Sociology*, 55, 3 (September 2004), pp. 377-399; Mari Osawa, “The Vicious Cycle of the ‘Male Breadwinner’ Model of Livelihood Security”, *Voices from Japan*, No. 16 (Winter 2006), pp. 1-5.

to emerge: Standard Employment mainly concerned meanwhile in other kinds of labour relationship, women were over-represented. Even more so than in the past, precarious labour became a female occupation.

In the course of the 20th century, and especially since the 1940s, the number of unemployed and underemployed in the Global South grew by leaps and bounds. In the mid-1980s, the economic historian Paul Bairoch estimated that in Latin America, Africa and Asia, "total inactivity" was "on the order of 30-40% of potential working man-hours" – a situation without historical precedent, "except perhaps in the case of ancient Rome."¹⁵ In Europe, North America and Japan, the average level of unemployment has always been significantly lower. Moreover, it was determined mainly by the economic conjuncture, and it was therefore cyclical, while "over-unemployment" in de Global South (this term is used by Bairoch) has a structural character. One of the first analysts who drew attention to this reality was the Peruvian sociologist Anibal Quijano, who argued that the tens of millions of permanently "marginalized" workers in the Global South could no longer be regarded as a "reserve army of labour" in the Marxian sense, because their social condition was not temporary, and because they formed no "mass of human material always ready for exploitation", since their abilities were simply not compatible at all with the requirements of capitalist industry.¹⁶

In the Global North, the Standard Employment Relationship is now being broken down – step by step, but rather consistently so. The balance of power has shifted in favor of the employers. And in the OECD-countries, the relative proportion of precarious workers has steadily increased at the same time. A 2004 report of the European Union concluded "that in most countries precarious employment has increased over the last two decades."¹⁷ The same applies to the United States and Canada.¹⁸

So, Standard Employment is becoming scarcer in the advanced capitalist countries, and it seems to be even more a male privilege than was the

¹⁵ Paul Bairoch, *Cities and Economic Development. From the Dawn of History to the Present*. Trans. Christopher Braider (London: Mansell, 1988), p. 466.

¹⁶ Anibal Quijano Obregón, "The Marginal Pole of the Economy and the Marginalised Labour Force", *Economy and Society*, 3, 4 (November 1974), pp. 393-428; Marx, *Capital*, I, pp. 785-786.

¹⁷ *Precarious Employment in Europe. A Comparative Study of Labour Market related Risks in Flexible Economies* (Brussels: European Commission, 2004), pp. 58-59.

¹⁸ D.-G. Tremblay, "From Casual Work to Economic Security: The Paradoxical Case of Self-Employment", *Social Indicators Research*, 88, 1 (August 2008), pp. 115-130, at 121.

case previously.¹⁹ As a corollary, the labour relations of rich countries are beginning to look much more like those of poor countries. Precarization is a global trend and on the rise almost everywhere. The fierce, increasingly global competition between capitals now has a clear downward 'equalizing' effect on the quality of life and work in the more developed parts of global capitalism.

Nevertheless we should keep in mind that, globally and historically considered, there are different kinds of precarization. I think there are at least three basic variants:

1. Before the arrival of Standard Employment, precarious labour in advanced capitalism was restricted to particular, limited sectors of national economies, and had mainly a temporary and conjunctural character.
2. Precarious labour in contemporary advanced capitalism has spread to all sectors, and is now less conjunctural and more an effect of international competition, but it combines with some labour protection – by means of all kinds of laws and welfare-state regulations established from the 1940s to the 1970s, which still remain in force, even if they are being whittled away.
3. Precarious labour in de Global South has spread to almost all sectors, is especially structural in nature, and is to an important degree an effect of international competition. This variant involves a far greater number of people, and offers much less formal protection than that given to precarious labour in the Global North. In addition – and partly in consequence of this difference – the income differences between precarious workers in the North and the South remain gigantic.

San Precario teaches us, that wage labour occurs in many variations, and that insecurity and precariousness are historically normal in capitalist production. The "social" phase of capitalism was a rather brief one, and it involved only a relatively small geographic area on the planet.

Household Labour

A century ago, Rosa Luxemburg said: "Female domestic labour may indeed be 'a gigantic accomplishment of self-sacrifice and effort', but for capitalism it is 'mere air.' This is because, 'as long as the domination of

¹⁹ A pioneering study was Lourdes Benería, "Shifting the Risk: New Employment Patterns, Informalization, and Women's Work", *International Journal of Politics, Culture, and Society*, 15, 1 (Fall 2001), pp. 27-53; an international comparative perspective is offered by Leah F. Vosko, Martha MacDonald, and Iain Campbell (eds), *Gender and the Contours of Precarious Employment* (New York: Routledge, 2009).

capital and the wage system lasts – only work that creates surplus value and generates capitalist profit is considered to be productive.’ From this point of view, ‘the dancer in the music hall, whose boss pockets profit generated by her legs, is a productive worker, whereas all the toil of the wives and mothers of the proletariat within the four walls of home is considered to be unproductive activity.’²⁰ It took a long time before such observations led to a political economy of household labour. Margaret Benston was a pioneer in that area. She set the stage for it in 1969, when – in an article in *Monthly Review* – she highlighted the importance of “household labor, including child care.”

Benston linked the fact that such labour by housewives was unpaid, and therefore “valueless”, to its utter lack of prestige: “In structural terms, the closest thing to the condition of women is the condition of others who are or were also outside of commodity production, i.e., serfs and peasants.”²¹ In the 1970s, a very extensive and sophisticated international debate took place about the political economy of domestic labour, that simmered on well into the 1980s. One of the things this debate clarified was that subsistence production is omnipresent. As the so-called Bielefeld School in Development Studies argued, subsistence labour is a “condition and part of all social production (and was therefore inherently social in its own right), it was also a precondition for perpetuating all forms of commodity production and wage labour, even the most sophisticated ones.”²² While some households do not perform subsistence labour, they are exceptional and far from poor. The only proletarian reproducing without performing subsistence labour is “the ‘yuppie’ (Young Urban Professional) who, as a leading executive climbing the hierarchical ladder of the multi-national company he works for, orders a sandwich for lunch, and in the evening meets his ‘yuppie-wife’ (who is likely to be a professor or a stockbroker) over dinner in a restaurant, while at the couple’s rented apartment the maid is doing the household chores.”²³

This thought was developed further by C.L.R. James’s wife Selma Deitch (b. 1930), an independent radical thinker who in 1972 published the classic little

²⁰ Rosa Luxemburg, “[Frauenwahlrecht und Klassenkampf]”, in: Clara Zetkin (ed.), *Frauenwahlrecht* (Stuttgart, 1912), pp. 8-10, at 9.

²¹ Margaret Benston, “Political Economy of Women’s Liberation”, *Monthly Review*, 21, September 1969): 13-27, pp. 15-6.

²² Tilman Schiel and Georg Stauth, “Unterentwicklung und Subsistenzproduktion”, *Peripherie* 5-6 (1981), p. 134.

²³ Hans-Dieter Evers, “Schattenwirtschaft, Subsistenzproduktion und informeller Sektor”, in: Klaus Heinemann (ed.), *Soziologie wirtschaftlichen Handelns* (Opladen: Westdeutscher Verlag, 1987), pp. 353-366, at 360.

book *The Power of Women and the Subversion of the Community*—together with Mariarosa Dalla Costa – which “spelled out how that women’s unwaged housework and other caring work outside of the market produces the whole working class.”²⁴ Selma James (as she is generally known) co-ordinated the International Women Count Network, which “won the UN decision where governments agreed to measure and value unwaged work in national statistics.”²⁵ She also played, since 1972, a leading role in the International Wages for Housework Campaign. Consistent with this, Selma James has argued for quite some time for a Global Women’s Strike, directed at the abolition of military budgets and the investment of the capital so released in human care work.

Whether or not we agree with the demand of wages for housework, today nobody can claim anymore that class relationships can be understood without including the ever-present subsistence labour that is worked alongside paid labour.

Global Connections

Selma James thinks globally, and the same applies in different ways to two other personalities whom I would like to involve in my talk. Like C.L.R. James, both of them grew up in Trinidad at roughly the same time. The first is Oliver Cromwell Cox (1901-1974), a brilliant economist and sociologist, who not only developed his own variant of world systems theory ten years before Immanuel Wallerstein did, but who also – based on his global perspective – defended the following thesis already in 1959:

“It should not be forgotten that, above all else, the slave was a worker whose labor was exploited in production for profit in a capitalist market. It is this fundamental fact which identifies the Negro problem in the United States with the problem of all workers regardless of color.”²⁶

In this way, Cox formulated an essential aspect of international solidarity. The same solidarity was concretely put into practice by Malcolm Nurse (1903-1959), alias George Padmore, a childhood friend of C.L.R. James.²⁷

²⁴ <<http://globalwomenstrike.net/content/selma-james-80-15-august-year>>. For the historical context see: Maud Anne Bracke, “Between the Transnational and the Local: Mapping the Trajectories and Contexts of the Wages for Housework Campaign in 1970s Italian Feminism”, *Women’s History Review*, 22, 4 (2013), pp. 625-642.

²⁵ For more on Selma James see her *Sex, Race and Class: the Perspective of Winning. A Selection of Writings, 1952-2011* (Oakland, CA: PM Press, 2012).

²⁶ Oliver Cox, *Caste, Class, and Race. A Study in Social Dynamics* (New York: Monthly Review Press, 1959), p. xxxii.

²⁷ James wrote about him: “we were boys together, and used to bathe in the Arima River, underneath the ice factory”. C.L.R. James, *Spheres of Existence* (London: Alison & Busby, 1980), p. 238.

As is well known, in the early 1930s Padmore played a key role in the attempts of the Communist International to organize black workers. He was the main founder of the International Trade Union Committee of Negro Workers in 1930 and of the paper *Negro Worker*. In 1934 he was expelled from the communist movement, but within months he had established the International African Service Bureau with C.L.R. James, which became a meeting point for Caribbean and African anti-colonial intellectuals.

Implications

Let me now draw some general implications from the four vignettes I sketched. If we think through the arguments of the Caribbean radicals, the Italian followers of San Precario, and feminists like Margaret Benston, Selma James and others, then we arrive at far-reaching conclusions. The history of capitalist labour must encompass all forms of physically or economically coerced commoditization of labour power: wage labourers, slaves, sharecroppers, convict labourers, and so on – *plus* all labour which creates such commoditized labour or regenerates it, that is parental labour, household labour, care labour, and subsistence labour.

And if we try and take all these different forms of labour into account, than we should use households as the basic unit of analysis than individuals, because, as Jean Quataert once noted, “it permits keeping in focus at all times the lives of both men and women, young and old, and the variety of paid and unpaid work necessary to maintain the unit.”²⁸

Assume for the moment that you can agree with these very fundamental assumptions. It is clear that our picture of history must then change drastically. To begin with, we will have to reconsider our concept of capitalism. Traditionally Marxists and non-Marxists believed that the rise of capitalism necessarily goes hand in hand with the diffusion of ‘free’ wage labour, as we have seen.

But if capitalism does not have any structural preference for free wage labour, then capitalism can also have occurred in situations where hardly any wage labour was done, but (for example) where chattel slavery prevailed. If we no longer define capitalism in terms of a contradiction between wage-labour and capital, but in terms of the *commodity form* of labour power and other elements of the production process, then it makes sense to define capitalism as a circuit of transactions and work processes, in which tendentially “production of commodities by means of commodities” occurs (borrowing

²⁸ Jean H. Quataert, “Combining Agrarian and Industrial Livelihood: Rural Households in the Saxon Oberlausitz in the Nineteenth Century”, *Journal of Family History*, 10 (1985), pp. 145-162, at 158. See on this problematic also my “Introduction” and “Conclusion” in Jan Kok (ed.), *Rebellious Families. Household Strategies and Collective Action in the Nineteenth and Twentieth Centuries* (Oxford and New York: Berghahn, 2002), pp. 1-23 and 230-242.

Piero Sraffa's famous expression). This ever-widening circuit of commodity production and distribution, where not just labour products but also means of production and labour itself acquire the status of commodities, is what I would call capitalism. This definition deviates somewhat from Marx's, but it is also consistent with Marx, in that he regarded the capitalist mode of production as "generalized" or "universalized" commodity production.²⁹ It differs however from definitions which regard capitalism simply as "production for the market", which disregards the specific labour relations involved in production, i.e. it differs from the description we encounter in the writings of Immanuel Wallerstein and his school.³⁰

On the basis of a revised definition of capitalism, I think we might well conclude that the first fully capitalist society was not 18th century England, but ... Barbados, the small Caribbean island (430 km²) that was probably the most prosperous slaveholding society in the 17th century. Colonization began in 1627, when eighty British planters reached the (probably uninhabited) island and started five plantations.³¹ Investments were originally in the cultivation of tobacco, subsequently in cotton and indigo production, and finally, roughly from 1643, growing sugar cane. By 1680, the sugar industry covered 80 percent of the island's arable land, employed 90 percent of its labour force, and accounted for about 90 percent of its export earnings. The so-called "Sugar Revolution" dominated agricultural development in the English West Indies for several centuries.³² The point is, that the production and consumption process in Barbados was almost totally commodified: the workers (chattel slaves) were commodities, their food was mainly purchased from other islands, their means of production (like sugar mills) were manufactured commercially, and their labour product (cane sugar) was sold on the world market. Few countries have ever existed since that

²⁹ Marx describes capitalist society as "a society where the commodity-form is the universal form of the product of labour, hence the dominant social relation is the relation between men as possessors of commodities." (*Capital*, I, p. 152). He argues that "The capitalist epoch is... characterized by the fact that labour-power, in the eyes of the worker himself, takes on the form of a commodity which is his property; his labour consequently takes on the form of wage-labour. On the other hand, it is only from this moment that the commodity-form of the products of labour becomes universal." (*ibid.*, p. 274 note). Thus, "... from the moment there is a free sale, by the worker himself, of labour power as a commodity ... from then onwards ... commodity production is generalized and becomes the typical form of production." (*ibid.*, p. 733).

³⁰ "[The large agricultural units in ancient Greece] were run mostly on capitalistic lines; their products, that is to say, were chiefly sold in the market, not consumed by the producers." Michael I. Rostovtzeff, *Social and Economic History of the Hellenistic World* (Oxford: Clarendon Press, 1941), I, pp. 100-1.

³¹ Gary Puckrein, "Did Sir William Courteen Really Own Barbados?", *Huntington Library Quarterly*, 44, 2 (Spring 1981), pp. 135-149, at 136-137.

³² Hilary McD. Beckles and Andrew Downes. "The Economics of Transition to the Black Labor System in Barbados, 1630-1680", *Journal of Interdisciplinary History*, 18, 2 (Autumn, 1987), pp. 225-247, at 226.

time where every aspect of economic life was so strongly commoditized. In 1672, Governor Willoughby estimated that Barbados “did not furnish of its own growth ‘one quarter Victualls sufficient for its Inhabitants nor any other necessaries for Planting [...]’”³³ It was in that sense a true capitalist country, albeit a very small one. And it could, of course, only exist thanks to its integration in a wider colonial Empire.

Thus, it is no longer so certain that England was the birthplace of modern industrial capitalism. If we adopt a non-Eurocentric perspective, we gain three insights: 1) important developments in the history of employment began much earlier than previously thought; 2) they began with unfree workers and not with free workers; and 3) they began not in the US or in Europe, but in the Global South. With great sagacity, C.L.R. James, Eric Williams, George Padmore and Oliver Cox already paved the way for these insights.

But there is more. Wage labour as such is – as the inventors of San Precario have highlighted – very much a multifaceted phenomenon. Insecurity and lack of protection are the historical norm under capitalism, and the Standard Employment Relationship is really only a “blip” on the movie screen of world history. The feminist discussion has clarified that capitalism cannot exist without subsistence labour – which is often called “reproductive labour” although that term is a bad choice, since reproduction is production just like all other production.

The outsider-perspective of black people, women and precarious workers draws attention to aspects of working life which traditional labour history has previously neglected. Labour history is not just the history of so-called “free” wage earners, but also of slaves and other unfree workers, and of unpaid subsistence-labourers, especially housewives. Thus, global labour history has the task of integrating an international multiverse of class forces in one totalizing analysis.

³³ Cited in Richard Sheridan, *The Development of Plantations to 1750. An Era of West Indian Prosperity 1750-1775* (Barbados: Caribbean Universities Press, 1970), p. 28.

UNFREE LABOUR: THE TRAINING-GROUND FOR MODERN LABOUR MANAGEMENT

"Besides, as the Master is placed so high above the Condition of the Journeyman, both their Conditions approach much nearer to that of a Planter and Slave in our *American* colonies than might be expected in such a country as *England*. ... The Master ... is naturally tempted by his situation to be proud and over-bearing, to consider his people as the Scum of the Earth, whom he has a right to squeeze whenever he can; because they ought to be kept low, and not to rise up in Competition with their Superiors."

- Josiah Tucker, *Instructions for Travellers. A Brief Essay on the Advantages and Disadvantages which respectively attend France and Great Britain, with regard to Trade* (Dublin: William Watson, 1758), p. 38.

"Manufactures ... prosper most, where the mind is least consulted, and where the workshop may, without any great effort of imagination, be considered as an engine, the parts of which are men."

- Adam Ferguson, *An Essay on the History of Civil Society*, 1767, pp. 280, 285.

"The overseer's book of penalties replaces the slave-driver's lash."

- Karl Marx. *Capital*, vol. I. Trans. Ben Fowkes (Harmondsworth: Penguin, 1976), p. 550.

"Working and living together in gangs of hundreds on the huge sugar-factories that covered the North Plain, they [the slaves on Saint Domingue] were closer to a modern proletariat than any group of workers at the time."

- C.L.R. James, *The Black Jacobins*. Second edition, revised (New York: Vintage Books, 1963), p. 66.

Introduction

Frederick Winslow Taylor famously wrote in 1911: "This work is so crude and elementary in its nature that the writer firmly believes that it would be possible to train an intelligent gorilla so as to become a more efficient pig-iron handler than any man could be."³⁴ Antonio Gramsci believed, that Taylor was using a metaphor here , "to indicate how far one can go in a certain direction: in any physical work, no matter how mechanical and degraded, there is a minimum of technical skill, that is, a minimum

³⁴ Frederick W. Taylor, *Principles of Scientific Management* (New York: Harper, 1911), p. 40.

of creative intellectual activity.”³⁵ But was the “intelligent gorilla” really only a metaphor? An agricultural historian of the United States noted: “As early as 1820 an imaginative Louisiana planter imported a cargo of Brazilian monkeys with the hope of training them to pick cotton.”³⁶ (The experiment failed.)

The conceptualization of the work site as “an engine, the parts of which are men”, where there is “a total suppression of sentiment and reason” (Adam Ferguson) is usually seen as a result of the first and second industrial revolutions in Western Europe and North America – in factories employing “free” wage labourers. It is this paper’s contention that we need to fundamentally rethink the history of modern labour-management techniques in several ways. We have to step outside the traditional intellectual grid, and to take into consideration the Global South, non-industrial, and physically coerced labour.

The colonies and un-free labour represent blind spots in management history; they are almost never part of the story. This is not to deny, that during the last few decades very important work has been done in the field of management history and that we now understand many aspects of the way in which employers have dealt with their employees much better than we used to. But despite these significant achievements, the dominant narrative remains deeply Eurocentric.³⁷

Mainstream historiographies usually start by saying that labour management has been around for thousands of years, and that large-scale projects like the Egyptian pyramids or China’s Great Wall would not have been possible without the conscious coordination of labour processes. Modern labour management, however, began in the middle of the eighteenth century, with the birth of the factories and their capitalist logic: “unlike the builders of pyramids”, the new managers “had not only to show absolute results in terms of certain products of their efforts, but to relate them to costs, and sell them competitively.”³⁸ Modern time discipline, technical training, and other innovations were the outcome. During the second half of the nineteenth century further important changes took place, primarily in the United States, resulting in the invention of Scientific Management, etc.

³⁵ Antonio Gramsci, Antonio, *Prison Notebooks*. Vol. II. Edited and translated by Joseph A. Buttigieg (New York: Columbia University Press, 2011), p. 200 (Notebook 4, §49).

³⁶ James H. Street, “Mechanizing the Cotton Harvest”, *Agricultural History*, 31, 1 (1957), pp. 12-22, at 13.

³⁷ See, for example, Daniel R. Wren’s influential book *The History of Management Thought*. Fifth Edition (Hoboken, NJ: Wiley, 2005).

³⁸ Sidney Pollard, *The Genesis of Modern Management. A Study of the Industrial Revolution in Great Britain* (London: Edward Arnold, 1965), pp. 6-7.

This narrow historiographical perspective broadened when critical criminologists began to pay attention to parallels between prisons and factories.³⁹ Building on this trend Michel Foucault and others focused on the rise of disciplinary power in schools, psychiatric institutions, barracks, and factories, and claimed that “the technological mutations of the apparatus of production, the division of labour and the elaboration of the disciplinary techniques sustained an ensemble of very close relations. Each makes the other possible and necessary; each provides a model for the other.”⁴⁰ An increasing number of studies explored the homologies between monastic, military and industrial discipline.⁴¹

Despite such revisions and extensions, the approach to the history of labour management continued to be based on two hidden assumptions. On the one hand the model was deeply internalist: the developments in the North Atlantic region were explained through developments in the North Atlantic region; all the big innovations began in Britain, the United States, France or Germany. On the other hand, the emphasis was very much on “free” wage labour. Few historians paid attention to unfree labour. An exception confirming the rule is Alfred Chandler who, in his great book *The Visible Hand*, of over 600 pages, devotes less than three pages to the slave plantation, arguing that, “as the first salaried manager in the country, the plantation overseer was an important person in American economic history”, though the plantation followed “a traditional pattern” and “had little impact on the evolution of the management of modern business enterprise.”⁴²

Contrary to the mainstream I want to suggest that 1) important innovations were born outside the North Atlantic region (especially in the colonies), in attempts to control *unfree* workers; 2) that some of these innovations date from long before the Industrial Revolution; and 3) that knowledge about such innovations travelled through all parts of the globe. What I have to say is tentative though, and will need more research.⁴³

³⁹ Pathbreaking was Georg Rusche and Otto Kirchheimer, *Punishment and Social Structure* (New York: Columbia University Press, 1939).

⁴⁰ Michel Foucault, *Discipline and Punish. The Birth of the Prison*. Trans. Alan Sheridan (Harmondsworth: Penguin, 1977), p. 221.

⁴¹ For example, Dario Melossi and Massimo Pavarini, *The Prison and the Factory. Origins of the Penitentiary System*. Trans. Glynis Cousin (London and Basingstoke: Macmillan, 1981), or Hubert Treiber and Heinz Steinert, *Die Fabrikation des zuverlässigen Menschen. Über die “Wahlverwandtschaft” von Kloster- und Fabrikdisziplin* (Munich: Heinz Moos, 1980; second edition Münster: Westfälisches Dampfboot, 2005).

⁴² Alfred D. Chandler, *The Visible Hand. The Managerial Revolution in American Business* (Cambridge, MA and London: The Belknap Press of Harvard University Press, 1977), pp. 65-66.

⁴³ Support for my contention comes from Bill Cooke, “The Denial of Slavery in Management Studies”, *Journal of Management Studies*, 40, 8 (December 2003), pp. 1895-1918, a very stimulating essay focusing on a part of the Global North (the United States).

Real Subsumption

The management techniques that I will be discussing here are all about what Marx called the *real subsumption of labour under capital*. Let me explain. Somewhat simplifying, there are two possibilities. Either capitalist entrepreneurs incorporate older (pre-capitalist) labour processes into their enterprises without changing the nature of these labour processes. In this case, technologically speaking, “the *labour process* goes on as before, with the proviso that it is now *subordinated* to capital.”⁴⁴ This so-called *formal* subsumption of labour under capital alters, however, two aspects of the labour process: its endogenous power relations (a new “relation of supremacy and subordination” is introduced), and the use of labour time: “labour becomes far more continuous and intensive, and the conditions of labour are employed far more economically, since every effort is made to ensure that no more (or rather even less) *socially necessary* time is consumed in making the product.”⁴⁵ The *real* subsumption of labour under capital begins, once the entrepreneur starts to reshape the work process as such, by transforming “the nature of the labour process and its actual conditions”, and by introducing new methods of production, based on “the direct application of science and technology”.⁴⁶

This transition from formal to real subsumption changes labour relations fundamentally. Under formal subsumption, work remained volatile. There was, as Werner Sombart already observed, little cooperative “restraint, discipline, cogency”, since effective coordination was absent, and the “personal lack of discipline of each separate worker” impacted on the collectivity. The work was also interrupted frequently for a number of other reasons: the workers’ movement back and forth between agriculture and industry, the seasonal nature of many industrial activities, or stagnant markets.⁴⁷ Under real subsumption, the labour process becomes much more continuous, coordinated and uniform.

There are at least two important aspects of real subsumption that deserve our attention: direct supervision and standardization. The best way to explain these aspects is to travel, first, to seventeenth-century Barbados and, second, to early nineteenth-century Sydney, Australia.

⁴⁴ Karl Marx, *Capital*, vol. I. Trans. Ben Fowkes (Harmondsworth: Penguin, 1976), p. 1026.

⁴⁵ *Ibid.*, pp. 1026-1027.

⁴⁶ *Ibid.*, pp. 1034-1035.

⁴⁷ Werner Sombart, *Der moderne Kapitalismus*. Fourth edition, vol. II/2 (Munich and Leipzig: Duncker & Humblot, 1916), pp. 830-832.

First Example: Seventeenth-Century Barbados

In the first instance, the planters on Barbados had mainly used indentured labourers (servants), but for economic reasons they quickly shifted to the employment of African slaves. From the 1650s unskilled labour was increasingly done by slaves of African descent; later slaves took over skilled labour as well, and "by 1690 servants had a monopoly of only the overseer functions, most carpenters, masons, sugar boilers, and bricklayers being black slaves."⁴⁸

On seventeenth-century Barbados, the optimum size for efficient sugar production was a plantation of about 200 acres, equipped with a hundred slaves.⁴⁹ This was quite a large kind of enterprise at the time. The sugar planter was simultaneously a farmer and a manufacturer.

"He had to feed, clothe, house, and supervise his labor force year-round. He needed one or two mills to extract juice from the harvested cane, a boiling house to clarify and evaporate the cane juice into sugar crystals, a curing house for drying the sugar and draining out the molasses, a distillery for converting the molasses into rum, and a storehouse in the nearest port for keeping his barreled sugar until it could be shipped to England. An operation of this size required a capital investment of thousands of pounds."⁵⁰

The whole process of sugar production was both labour intensive and required, for biological and ecological reasons, careful planning and supervision. A major difference between a Caribbean sugar plantation and an English farm was the size of the work force. While in England or North America animals pulled plows and harrows, in the Caribbean slaves did such work. A slave field labourer had only three tools: an ax, a hoe, and a bill. The reason for all this inefficiency was to keep the slaves busy at all times.

"Cane cultivation, like most farming is seasonal. The planter needs a large labor force at crop time, but not during the slow six months of the year from July through December. Yet the seventeenth-century slave-owning planter had to keep his laborers fully occupied in the slow months, as well as in crop time, to forestall mischief and rebellion. So he put them to work in the fields with hoes instead of horse-drawn plows. The slave's appointed tasks were exceedingly monotonous and degrading, and he executed them unwillingly, unskilfully, and inefficiently."⁵¹

⁴⁸ Hilary McD. Beckles and Andrew Downes, "The Economics of Transition to the Black Labor System in Barbados, 1630-1680", *Journal of Interdisciplinary History*, 18, 2 (Autumn 1987), pp. 225-247, at 227.

⁴⁹ Richard S. Dunn, *Sugar and Slaves. The Rise of the Planter Class in the English West Indies, 1624-1713* (Chapel Hill, NC: University of North Carolina Press, 1972), p. 96.

⁵⁰ *Ibid.*, pp. 189-190.

⁵¹ *Ibid.*, p. 200.

It was under these circumstances that modern labour management, based on the real subsumption of labour under capital, was invented: Large numbers of recalcitrant labourers doing monotonous work, and by their very existence threatening the tiny white European elite. If the planters wanted to survive, close supervision of the work force was of the essence. As Robert Fogel has observed: sugar plantations created industrial discipline, “partly because sugar production lent itself to a minute division of labour, partly because of the invention of the gang system, which provided a powerful instrument for the supervision and control of labour, and partly because of the extraordinary degree of force that planters were allowed to bring to bear on enslaved black labor.”⁵²

In principle there are two methods to supervise workers: overseeing the effort, or overseeing the result. An example of overseeing the *result* is the so-called task system: slaves were assigned a daily task, like working a certain number of square meters, and if the task, according to the opinion of the overseer, had been orderly fulfilled, the working day was over. Overseeing results becomes easier, the more different workers work independently from each other. Conversely, the greater the interdependence of the tasks, the more difficult it becomes for the overseers to judge the individual result. In overseeing the *effort*, the overseer makes sure that the worker works hard enough. This type of overseeing presupposes permanent control, and is all the easier the simpler the tasks to be fulfilled are. If additional qualifications and skills are necessary, it becomes more difficult for the overseer to estimate the intensity of labour.⁵³

Overseers, or others contracted for this work, can punish or reward workers for their efforts. In principle, they have three means at their disposal: compulsion; material and immaterial rewards; and persuasion.⁵⁴ Compulsion includes threat with or without the application of force, including incarceration, tormenting, mutilation, sale (of slaves), dismissal (of wage workers) or even death. Such negative sanctions may indeed lead to the workers working hard, but not to them doing their work well. And negative sanctions encourage resistance and sabotage (which, in turn, are more effective the more complicated and skilled the labour process is).

⁵² Robert W. Fogel, *Without Consent or Contract. The Rise and Fall of American Slavery* (New York: Norton, 1989), p. 26.

⁵³ Michael Burawoy and Erik Olin Wright, “Coercion and Consent in Contested Exchange”, in: *Interrogating Inequality. Essays on Class Analysis, Socialism and Marxism*, edited by Erik Olin Wright (London and New York: Verso, 1994), pp. 81-82.

⁵⁴ Chris Tilly and Charles Tilly, *Work Under Capitalism* (Boulder, CO: Westview Press, 1998), p. 74.

Compulsion is therefore most effective for very simple labour processes which are easy to oversee.⁵⁵

The gang system was almost exclusively used for unskilled routine labour. That the gang system was very efficient has been confirmed by numerous scholars. About the precise reasons of this efficiency, the experts disagree: was it that the close supervision made the slaves less careless and hasty, thus improving the quality of their work? Was it the “steady and intense rhythm of work” which it achieved? Or was it the effective utilization of slaves with different physical capabilities?⁵⁶ From a management perspective, the introduction of effort control was a major innovation. It robbed the individual workers of almost all autonomy and made domination at the work site nearly absolute. Totalizing control and unfree labour went historically hand in hand.⁵⁷

From Barbados the method of controlling labour directly through a gang system spread to other parts of the Caribbean and to the South of the United States.⁵⁸ It transformed work into a machine-like process. Frederick M. Olmstedt, an observer of slave plantations in the US South, wrote in 1861:

“[Slaves] are constantly and steadily driven up to their work, and the stupid, plodding, machine-like manner in which they labour is painful to witness. This was especially the case with the hoe-gangs. One of them numbered nearly two hundred hands (for the force of two plantations was working together), moving across the field in parallel lines, with a considerable degree of precision. I repeatedly rode through the lines at a canter, with other horsemen, often coming

⁵⁵ Stefano Fenoaltea, “Slavery and Supervision in Comparative Perspective: A Model”, *Journal of Economic History*, 44 (1984), pp. 635-668, at 639-640. Heavy physical punishments can, in addition, have the economic disadvantage that workers become temporarily or permanently unable to work.

⁵⁶ L.C. Gray, *History of Agriculture in the Southern United States to 1860*. 2 volumes (New York: Peter Smith, 1941), vol. 1, p. 556; Robert W. Fogel and Stanley L. Engerman, *Time on the Cross. The Economics of American Negro Slavery*. 2 volumes (New York and London: Norton, 1989), vol. 1, p. 204 (including quote); J.T. Toman, “The Gang System and Comparative Advantage”, *Explorations in Economic History*, 42 (2005), pp. 310-323. Further reflections in Philip D. Morgan, “Task and Gang Systems: The Organization of Labor on New World Plantations”, in: Stephen Innes (ed.), *Work and Labor in Early America* (Chapel Hill, NC: University of North Carolina Press, 1988).

⁵⁷ Although there was a *tendency* toward total domination and control probably in unfree labor, there probably always remained a marginal manoeuvring space for coerced laborers. Even in Nazi concentration camps the SS “needed some minimal cooperation from the prisoners in order to carry out the day’s routine of getting them to the dormitories, feeding them, and making them work.” Barrington Moore, Jr., *Injustice. The Social Bases of Obedience and Revolt* (White Plains, NY: M.E. Sharpe, 1978), p. 65.

⁵⁸ For the trajectory of the North American “plantation revolution”, see Ira Berlin, *Generations of Captivity. A History of African-American Slaves* (Cambridge, MA: The Belknap Press of Harvard University Press, 2003), Chapter 2.

upon them suddenly, without producing the smallest change or interruption in the dogged action of the labourers, or causing one of them ... to lift an eye from the ground. ... a tall and powerful negro who walked to and fro in the rear of the line, frequently cracking his whip, and calling out in the surliest manner, to one and another, "Shove your hoe, there! shove your hoe!"⁵⁹

Peter Coclanis seems to be justified in saying that "agricultural units organized under the gang system more closely resembled factories in the fields, and everything that this nineteenth-century metaphor connoted."⁶⁰

Second Example: Early-Nineteenth Century Sydney

But now, let us travel to Sydney. After Britain had lost its North American colonies in 1776, it needed a new outlet for its "surplus" of prisoners. Australia, and more in particular New South Wales, became the new "open-air prison." Around 1800 the area counted five thousands British residents, about a third of whom were convicts. The working day of those employed by the public authorities consisted of two parts. In the morning they performed public labour and received public rations, and in the afternoon they worked on their own account, so that they could pay for their housing, and food. Discipline was enforced with physical punishment; the maximum number of whip lashes was five hundred.⁶¹ After several rebellions of the prisoners and destabilizing intra-elite conflict, London sent a new governor in 1810, called Lachlan Macquarie.

⁵⁹ Frederick Law Olmsted, *The Cotton Kingdom. A Traveller's Observations on Cotton and Slavery in the American Slave States 1853-1861* (1861). Edited with an Introduction by Arthur M. Schlesinger (New York: Knopf, 1953), p. 452; here quoted from Cooke, "Denial of Slavery" in *Management Studies*, *Journal of Management Studies*, 40, 8 (December 2003), pp. 1895-1918. Gradually, many slave plantations in several parts of the Americas made the uniform slave gang the backbone of their agricultural labor process. In the nineteenth century, many plantations in the US used three kinds of work gangs on slave plantations, of which the so-called 'great gang' was the most important. "It was under the head driver. Composed of the ablest men and women, it sometimes numbered as many as a hundred. [...] The Negroes worked in one or more parallel lines or rows. The head driver, his assistant, and perhaps a 'bookkeeper' visited each row and saw that the work was done well. An animating folk song started by one of the Negroes, was sung by the gang, and was encouraged as a stimulus to labor and a relief to its monotony. Such a song, sometimes composed by the African, was sung as a solo, the gang joining in the chorus." Frank Wesley Pitman, "The Organization of Slave Labor", *Journal of Negro History*, 11, 4 (October 1926), pp. 595-605, at 599-600.

⁶⁰ Peter A. Coclanis, "How the Low Country Was Taken to Task: Slave-Labor Organization in Coastal South Carolina and Georgia", in: Robert Louis Paquette and Louis A. Ferleger (eds), *Slavery, Secession, and Southern History* (Charlottesville and London: University Press of Virginia, 2000), p. 61.

⁶¹ Stuart Macintyre, *A Concise History of Australia*. Third Edition (Cambridge: Cambridge University Press, 2009), pp. 35 and 43.

As a military man, Macquarie was familiar with formal approaches to work regulation, and in his attempt to reorganize the colony he introduced advanced labour management techniques. His main initiatives were: “improving convict supervision so as to tighten the span of supervisor control; reducing negative and increasing positive reward systems to improve convict motivation; rationally matching convict skills with convict employment; transforming work measurement into regular and detailed weekly reports; and in the construction of convict job descriptions.”⁶²

Macquarie’s Regulations for the Police of Sydney (1811) contained the first detailed job descriptions outlining the tasks of individual police officers – the majority of whom were convicts! – and the structure of command. “These job descriptions were part of the Governor’s systematic bureaucratisation of colonial administration *and* the labour process generally.” In June 1813 he designed job descriptions for the workers at the Government Stock (keepers of cattle). Macquarie “was still writing and defining job instructions in his final year in 1821, when he wrote a small document of instructions for the Government Dock Yard.”⁶³

These experiments are also remarkable, because the mainstream management histories often tell us, that the first systematic non-military job descriptions were attempted by Frank and Lilian Gilbreth a century later.⁶⁴

Circulation of Knowledge

Crucial labour-management techniques were thus invented under colonial, unfree circumstances, long before these methods were applied in Europe as well. Perhaps this in itself does not have to surprise us, because experiments with labourers are always easier when these labourers are extremely subjected. And the colonies had of course also been laboratories for other experiments as well.

“The first systematic inventory of population, livestock, crops and landholdings was conducted by Cromwell’s adviser William Petty after the conquest of Ireland. Cadastral surveys were instituted as administrative routine by the British in India long before they came to Britain itself, where they threatened the monopoly on information enjoyed by local solicitors. It was in the colonies, too, that identity cards were first designed and issued; fingerprinting was first used in Bengal, to ensure that only certified pensioners were collecting their monthly

⁶² Bill Robbins, “Governor Macquarie’s Job Descriptions and the Bureaucratic Control of the Convict Labour Process”, *Labour History* [Australia], 96 (May 2009), pp. 1-18, at 5.

⁶³ *Ibid.*, pp. 7 (quote), 10, and 13 (quote).

⁶⁴ See e.g., Lilian Gilbreth, *The Psychology of Management. The Function of the Mind in Determining, Teaching and Installing Methods of Least Waste* (New York: Sturgis & Walton, 1914).

remuneration, and collecting it only once. If these field trials were successful, the technique could be repackaged and exported back to the metropole.”⁶⁵

The question thus arises: did the same techniques (direct supervision of unskilled l, and standardization of work processes through detailed job descriptions) develop independently in Europe, have these techniques been transferred, or was there a combination of these two possibilities? I suspect that all three variations are part of the story, but for the moment I would like to focus on the transfer of managerial techniques across continents, a very much understudied topic.

i) We know almost nothing about the *South-North transfer*. Thus far, we can mainly speculate. According to Robin Blackburn, the notion of the “plant” (i.e. the industrial complex) is derived from the older notion of the “plantation”: “By gathering the workers under one roof, and subordinating them to one discipline, the new industrial employers were able to garner the profits of industrial co-operation and invigilation – as it were adapting the plantation model (which is why people came to speak of steel ‘plants’).”⁶⁶ It is not entirely certain that Blackburn is right.

Chronologically, his hypothesis makes sense, however. “Plantation” in the sense of a large estate where cotton, tobacco, or other cash crops are grown, was first recorded in 1706 in Phillips’ *Dictionary*. “Plant” – in the sense of productive complex – was mentioned for the first time in 1789.⁶⁷ But not all etymologists agree. Many of them seem to believe, that “plant” is not derived from “plantation”, but that both “plant” and “plantation” are derived from the verb “planting”, the activity of putting something in a place. Whether this is testimony of a Eurocentric bias or not, needs to be investigated.

⁶⁵ Richard Rottenburg, “Social and Public Experiments and New Figurations of Science and Politics in Postcolonial Africa”, *Postcolonial Studies*, 12, 4 (2009), pp. 423-440, at 434.

⁶⁶ Robin Blackburn, *The Making of New World Slavery* (London and New York: Verso, 1997), p. 565. Compare Michael Craton’s remark: “A hitherto unnoticed transition – awaiting a full etymological investigation – was the way in which the transference described in this paper [the rise of the modern slave-based plantation] were accompanied by the narrowing down of the very word ‘plantation’ in the English Language – from being simply a synonym for overseas colonisation of all types, coined in Ireland under the Tudors, to meaning only that extremely profitable, and therefore preferred, type of colonial exploitation here defined and described as the classic plantation model.” Michael Craton, *Empire, Enslavement and Freedom in the Caribbean* (Kingston: Ian Randle, 1997), pp. 30-31.

⁶⁷ *The Barnhart Dictionary of Etymology* (n.p.: H.H. Wilson, 1988), p. 802.

Similarly, Elizabeth Esch and David Roediger point out, that

“the words ‘overseer’, naming the manager responsible for superintending and speeding up the labour of slaves, and “supervisor”, naming the manager performing the same roles in industry, have the same literal meaning. Similarly, the word ‘factories’ had named the West African staging areas gathering labouring bodies for the slave-trade, and then for the production of cotton, making possible the textile ‘factories’ of England and New England.”⁶⁸

More specific instances of circumstantial evidence come from the fact that the ties between elites of the colonies and the metropolises were strong. Eric Williams, in his seminal *Capitalism and Slavery*, has given detailed evidence of the intimate connections between Caribbean planters and the British bourgeoisie and aristocracy. Williams not only gives numerous examples of absentee landlords living in England in great wealth, but he also points out, that the West Indies were sending back annually hundreds of children to be educated.⁶⁹ It is likely, that members of the West Indian and English elites discussed methods of agricultural management, which were so important in the eighteenth century,⁷⁰ and that some of the “insights” gained in these discussions spilled over into the ideas about factory management at the end of that century. In this context, we should also not forget, that the first British factories were often build in rural areas.

In addition, it was not unusual for enterprises in the South of the United States, before the defeat of 1865, to employ slaves and free wage earners side by side.⁷¹ Transfer of labour-management techniques from unfree to free workers does not seem to be a far-fetched idea under such circumstances. And, more in general: the closely knit networks of US entrepreneurs in the nineteenth century must have stimulated exchange of managerial ideas between slaveholders and managers of free labour.

⁶⁸ Elizabeth Esch and David Roediger, “One Symptom of Originality: Race and the Management of Labour in the History of the United States”, *Historical Materialism*, 17, 4 (2009), pp. 3-43, at 9.

⁶⁹ Eric Williams, *Capitalism and Slavery* (London: Andre Deutsch, 1964), Chapter 4.

⁷⁰ “Everybody in eighteenth-century England was interested in farming. Even the distinctly urban minority was acquainted with farms, fields, and trees, and since farming became more profitable as the century progressed, interest in it grew greater.” G.E. Fussell, “The Farming Writers of Eighteenth-Century England”, *Agricultural History*, 21, 1 (January 1947), pp. 1-8, at 1.

⁷¹ See e.g., Robert S. Starobin, *Industrial Slavery in the Old South* (New York: Oxford University Press, 1970), or T. Stephen Whitman, “Industrial Slavery at the Margin: The Maryland Chemical Works”, *Journal of Southern History*, 59, 1 (February 1993), pp. 31-62.

ii) *South-South transfer* of managerial knowledge (of labour, but also of agricultural techniques) clearly took place on a wide scale, both within and between colonial empires. Two mechanisms seem to have been of special importance.⁷² First, the migration of planters and managers. The slave revolution of Saint Domingue (Haiti) 1791-1804 initiated an exodus of experts to, inter alia, Bengal.⁷³ Especially the abolition of slavery and the decline of the sugar plantations in the British West Indies in the 1830s and '40s set in motion a chain of migratory movements of planters to other parts of the colonial world. The decline of the profitability of Caribbean large-scale agriculture stimulated a transfer to Asia.⁷⁴

“Sometimes they [the planters] stayed in sugar; often they tried to change their luck by changing their product – and switched to coffee. Planters from the West Indies were employed in Natal and Ceylon. Some also went to Malaya, to the sugar and coffee estates of Province Wellesley; while the difficulties of coffee in the 1850s also caused some of the Ceylon planters to go to Malaya. When Fiji opened up in the 1870s, experienced sugar planters from Mauritius and Ceylon were attracted there (though many of the Fiji planters came from Queensland in Australia). When coffee-growing in Ceylon suffered the disastrous disease which ruined thousands of acres, most of the planters turned over to tea. A few joined the booming tea industry of Assam. Finally, at the beginning of the twentieth century, the rapid expansion of rubber-growing in Malaya started [...]. The demand for managers and assistants attracted hundreds of British, Dutch, French and Australian planters who had worked in the British sugar colonies, or on plantations in Java, or on the plantations of Queensland and the Pacific islands.”⁷⁵

Naturally, global circuits like these led to the transcontinental transfer of managerial knowledge. According to historian Patrick Peebles, “The plantations of Ceylon were modeled directly on the slave plantations of the Caribbean.” Extracts from P.J. Laborie’s handbook *Coffee Planter of Saint Domingo* (1798) were published in Ceylon in 1842, “without even changing the word ‘Negro’.”⁷⁶

Expert committees travelling back and forth between colonies, studying planting methods, workers’ housing, etc. were a second important source

⁷² Naturally, there have been other mechanisms than the ones discussed here. Jacobs, *Merchant in Asia*, 48, mentions the case of the son of a sugar planter from Guadeloupe who during the late eighteenth century came as a military to Ceylon and was requested by the Dutch governor to found sugar plantations on the island.

⁷³ See, e.g., Pierre-Paul Darrac and Willem van Schendel, *Global Blue. Indigo and Espionage in Colonial Bengal* (Dhaka: Dhaka University Press, 2006).

⁷⁴ V.G. Kiernan, *Lords of Human Kind. European Attitudes to the Outside World in the Imperial Age*. Revised Edition (Harmondsworth: Penguin, 1972), p. 79.

⁷⁵ Hugh Tinker, *A New System of Slavery. The Export of Indian Labour Overseas 1830-1920* (London: Oxford University Press, 1974), p. 177.

⁷⁶ Patrick Peebles, *The Plantation Tamils of Ceylon* (London and New York: Leicester University Press, 2001), p. 55.

of knowledge transfer.⁷⁷ The history of these committees has yet to be written, but the Dutch example reveals that, especially from the nineteenth century, but perhaps earlier, experts were sent to Cuba, Brazil, or Ceylon, to study agricultural and labour-management techniques. Sometimes this even resulted in a kind of transcontinental debate. In 1885, for example, the expert Van Delden Laërne published a long report on Brazilian coffee cultures, in which he also discussed the problems of slave labour in these cultures. This provoked Brazilian reactions (especially from emigrés in Paris) and a response by the Dutchman.⁷⁸

What all this suggests is, that labour management techniques should not be studied in geographical isolation, but as parts of an ongoing stream of constantly revised, adapted and extended knowledge systems.⁷⁹

⁷⁷ See, e.g., for an interesting case study: Richard A. Lobdell, "'Repression is not a Policy': Sydney Olivier on the West Indies and Africa", in: Roderick A. McDonald (ed.), *West Indies Accounts. Essays on the History of the British Caribbean and the Atlantic Economy in Honour of Richard Sheridan* (Kingston: University of the West Indies Press, 1996).

⁷⁸ An English version of the report was published as C.F. Van Delden Laërne, *Brazil and Java. Report on Coffee-culture in America, Asia and Africa*, to H.E. the Minister of the Colonies (London: W.H. Allen & Co., 1885). Reactions in *Revue commerciale, financière et maritime* [Rio de Janeiro], 73 (June 21-July 5, 1885); *La Liberté* [Paris], July 7, 1885; and *Le Brésil* [Paris], 94 (July 23, 1885). Van Delden Laërne responded in his "La culture du café au Brésil", *Bijdragen tot de Taal-, Land- en Volkenkunde van Nederlandsch-Indië*, 35 (1886), pp. 246-256.

⁷⁹ The North-South diffusion is probably documented best. In numerous cases in the past and the present engineers and skilled workers were transferred to colonial industries. The Bengal jute industry, for example, or other textile industries in the Global South made extensive use of such experts. This, of course, makes a lot of sense. Nathan Rosenberg correctly observed: 'Where the transfer of technology involved places geographically distant from one another, the reliance upon the migration of trained personnel (at least temporarily) was very strong.' Nathan Rosenberg, *Perspectives on Technology* (Cambridge: Cambridge University Press, 1976), p. 154.

But also metropolitan labor laws were 'reinvented' in the colonies. When slavery was formally abolished in much of the British Empire in 1834, all slaves of six year and older were redesignated as "apprentices" who would have to work for their former owners for several extra years. The planters were obliged to provide their workers with "Food, Clothing, Lodging, Medicine, Medical Attendance" and "other Maintenance and Allowances." In exchange, the apprentices were compelled to perform "forty-five Hours per Week" of unpaid labour for their former owners. This system was later also adopted by several other countries, the last one being Cuba in 1886. The fact that the bondage of ex-slaves in the first years after abolition was called "Apprenticeship" is no coincidence. The legal status of apprenticeship derives, of course, from the European guild system. Apprenticeship continued to exist, however, long after the guilds had been abolished; it has been characterized as a kind of "industrial serfdom". Alan McKinlay, "From Industrial Serf to Wage-Labourer: The 1937 Apprentice Revolt in Britain", *International Review of Social History*, 31, 1 (April 1986), pp. 1-18. See also Marc W. Steinberg, "Unfree Labor, Apprenticeship, and the Rise of the Victorian Hull Fishing Industry: An Example of the Importance of Law and the Local State in British Economic Change", *International Review of Social History*, 51, 2 (August 2006), pp. 243-276.

Conclusion

Modern labour management has many roots. There is no doubt, that the “disciplinary revolution” in European monasteries in the fifteenth and sixteenth centuries played a role, as did the “military revolution” of the seventeenth century. But in the future, we should also take into account the “disciplinary revolution” in the colonial world. It is likely that different practices influenced each other.⁸⁰

It seems obvious that slave plantations and other institutions based on coercion have been important sources for modern labour management. Not only eighteenth-century factory discipline was anticipated in the colonies, but also, for example, aspects of Scientific Management. In the 1830s, the former slave John Brown told in an interview:

“My old master [...] would pick out two or more of the strongest [hands], and excite them to race at hoeing or picking. [...] He would stand with his watch in his hand, observing their movements, whilst they hoed or picked [...]. Whatever [the winner] did, within a given time, would be multiplied by a certain rule, for the day’s work, and every man’s task would be staked out accordingly.”⁸¹

Contemporaries in the nineteenth century frequently observed the similarities between some industrial production systems and slave plantations. In his *Journal of a tour in Scotland in 1819* Robert Southey criticized Robert Owen’s New Lanark and its treatment of the workers as “human machines”:

“Owen in reality deceives himself. He is part-owner and sole Director of a large establishment, differing more in accidents than in essence from a plantation: the persons under him happen to be white, and are at liberty by law to quit his service, but while they remain in it they are as much under his absolute management as so many negro-slaves.”⁸²

⁸⁰ According to Blackburn, *The Making of New World Slavery*, p. 335, labour management on plantations echoed “not only shipboard life but also the related revolution in seventeenth-century military training and tactics associated with Maurits of Nassau.”

⁸¹ John Brown, *Slave Life in Georgia. A Narrative of the Life, Sufferings and Escape of John Brown, a Fugitive Slave*. Edited by F.N. Boney (Savanna: Beehive Press, 1972; first published London: W.M. Watts, 1855), pp. 145, 160. Compare also some observations in R. Keith Aufhauser, “Slavery and Scientific Management”, *Journal of Economic History*, 33 (1973), pp. 811-824.

⁸² Robert Southey, *Journal of a Tour in Scotland in 1819*. With an Introduction and Notes by C.H. Herford (London: John Murray, 1929), pp. 263-264. Against this background, the attempt of a Mississippi planter to transplant Owen’s practices to a slave plantation become understandable. See Mario Hayek *et al.* “Ending the Denial of Slavery in Management History: Paternalistic Leadership of Joseph Emery Davis”, *Journal of Management History*, 16, 3 (2010), pp. 367-379.

On the other hand, a planter in the US South hinted at the factory-like nature of the plantation, writing in 1833 that the “plantation might be considered as a piece of machinery” whose successful operation required that “all of its parts should be uniform and exact, and the impelling force regular and steady”.⁸³

Against this background the blind spot of those studying the history of labour management is remarkable. In 1973 Michel Foucault lectured in Rio de Janeiro on “Truth and Juridical Forms.” In a critical analysis of the three aspects of “panopticism” (supervision, control, and correction) he emphasized, as he had done in *Discipline and Punish*, the common deep structures of the prison, the factory, the psychiatric hospital, the barracks, etc. By way of illustration he described a factory employing four hundred female workers in the Rhône area, in the early 1840s. The women lived in a dormitory and

“had to get up every morning at 5 o’clock; at 5:50 they had to have finished washing and dressing, made their bed, and had their coffee; at 6 the compulsory work began, lasting until 8:15 in the evening, with a one-hour break for lunch; at 8:15, dinner and group prayer; retirement to the dormitories was at 9 o’clock on the hour. [...] The residents received no wages but, rather, a payment, a lump sum set at 40-80 francs per year, which was given to them only upon leaving.”⁸⁴

The strong similarities between this factory and the earlier coerced labour forms in the colonies jump to the eye. Erving Goffman was justified when he, before Foucault, observed that in some total institutions “a kind of slavery” existed.⁸⁵ But neither Foucault, nor Goffman thought of drawing a parallel with plantations – which is especially remarkable for Foucault, since he was lecturing in the Latin American country that had been the last to abolish slavery, in 1888. Such a huge blind spot can remain undetected for a long time. But once we have stepped outside the grid, there is no way back.

⁸³ Anon., “On the Management of Slaves”, *Southern Agriculturalist*, 6 (1833), pp. 281-287, at 286. Quoted in Mark M. Smith, “Time, Slavery and Plantation Capitalism in the Antebellum American South”, *Past and Present*, 150 (February 1996), pp. 142-168, at 151.

⁸⁴ Michel Foucault, “Truth and Juridical Forms”, in: Michel Foucault, *Power*, edited by James D. Faubion (New York: The New Press, 2000), pp. 73-74.

⁸⁵ Erving Goffman, “On the Characteristics of Total Institutions”, in: Erving Goffman, *Asylums. Essays on the Social Situation of Mental Patients and Other Inmates* (New York: Anchor Books, 1961), p. 10.

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