Class Dynamics of Development: A Methodological Note

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ABSTRACT

This article argues that class relations are constitutive of development processes and central to understanding inequality within and between countries. Class is conceived as arising out of exploitative social relations of production, but is formulated through and expressed by multiple determinations. It illustrates and explains the diversity of forms of class relations, and the ways in which they interplay with other social relations of dominance and subordination such as gender and ethnicity. This is part of a wider project to re-vitalise class analysis in the study of development problems and experiences.

KEYWORDS: class analysis, Marxism, development

1. Introduction: Researching class[1]

This special issue argues that class relations are constitutive of development processes and central to understanding inequality within and between countries. In doing so it illustrates and explains the diversity of class relations in

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contemporary world development, and the ways in which they interplay with other social relations such as gender and ethnicity. This is part of a wider project to re-vitalise class analysis in the study of development problems and experiences.

This article serves as a methodological introduction to the issue, where we outline our approach to conducting class analysis. This consists of the mediated application of class-relational concepts and categories to explain real world development processes. The article is organised as follows. In the remainder of this section we introduce our overall approach to class analysis. Section two outlines how our class-relational approach to development is rooted in the identification of capitalism's core dynamic as the (re)production of surplus value. Section three discusses how, and considers the analytical implications of the recognition that, class relations exist within and between classes in a variety of forms. Section four argues, in distinction to so much of contemporary development literature, that class dynamics are at the heart of developmental processes, whether micro or macro in scale. Section five focuses in particular on class struggles and their variety of forms. These last two sections and close the article by identifying ways in which contemporary historical processes can be interpreted as, in essence, the class dynamics of development.

Authors of the eight papers included in this special issue have all been part of the Historical Materialism and World Development Research Seminar (HMWDRS).[2] Through nearly a decade of collective academic engagement, we have developed a shared understanding of class rooted in historical materialism, which has been explored through our individual study of diverse historical and geographical cases. This shared theoretical foundation has allowed researchers based institutionally in a variety of disciplines to work together: including in anthropology, business and management, development studies, economics, geography, history and politics. We also share a commitment to careful empirical work in a wide range of regions, time periods and sectors. In analysing

development's class dynamics in historically and socially specific situations, either through fieldwork or archival research, members of the HMWDRS have faced the common challenge of operationalising a class-analytical methodology.

Our frame of reference is Marx's method, which he described as one 'of rising from the abstract to the concrete', and the understanding that the 'concrete is concrete because it is the concentration of many determinations, hence unity of the diverse'.[3] The identification of 'abstract' and 'concrete' does not denote 'theory' vs 'empirical'. It signifies, rather, the importance of utilising *general* concepts and categories ('capitalism', 'class', 'surplus value') to identify and analyse *particular* social forms (for example, the corporation, processes of local class formation, the nature of the Brazilian and Indian states, and so on). Put slightly differently, by 'concrete' we do not mean the empirical but a greater level of conceptual specification that reflects the diverse phenomenal forms of social relations.[4]

The general and the particular are not discrete: in terms of method, the abstract and the concrete are always in interplay. In this way we do not expect the same 'logic' of laws of motion – e.g. exploitation of labour to extract surplus-value – to take the same form in different times and places, although we do think that the global system of capitalist competition has 'gravitational tendencies'[5] that organise and shape diverse social relations around the profit motive. The rest of this section outlines our analytical approach through four core interrelated points, which we elaborate further through the rest of this introductory article. These are i) that class relations, while extending beyond the production process, are rooted in exploitative social relations of production; ii) that class is a relational and multidimensional concept; iii) that classes have agency, which is unevenly constrained and/or facilitated by the social structures with which it is mutually constituted; and iv) that class is understood world-historically.

First, classes are conceived here as arising out of the exploitative social relations of production of commodity-producing societies in a world dominated

by capitalism. As Jairus Banaji points out, Marx used the phrase social 'relations of production' as the expression for all economic relationships in the whole circuit of capital. These social relations are not, therefore, reducible to the literal *point* of production in the factories and fields.[6] From our class-relational perspective, production is not merely a technical relationship between inputs and outputs, but rather a conflictual process in which work is directed and controlled by the capitalist to ensure that the capacity to work is realised.[7] Exploitation is central to class relations, and in capitalist society it takes place, *in essence*, between capital and wage-labour.[8] This occurs when surplus-value is extracted from labour during 'surplus labour time', which is that part of the working day when the labourer no longer works for her own reproduction.

Exploitation presupposes the existence of generalised commodity production, the social division of labour, capitalist competition, and, crucially, social reproduction. For example, unpaid work performed largely in the domestic sphere including the nurturing of children, the refuelling of labouring bodies, and caring for sick workers is integral to the process of exploitation.[9] Class antagonism finds expression in a wide range of formal and informal social relations, institutions and practices, including, but not limited to: recruitment, retaining and redundancy of labour; education and training; consumption and housing; transport, trade, finance, logistics and advertisement. These are all actual and potential sites for accumulation through privatisation, financialisation, and neoliberal redistribution.[10] Further, these processes, which are simultaneously economic, social, political and historical, take specific ideological and cultural expressions, including subjective perceptions about status and positions – what Bourdieu may refer to as cultural, symbolic and social capital.[11] Class, in other words, is a complex concept constituted by 'many determinations' within the whole array of social relations.[12]

Our class-relational approach stands in contrast to stratification-oriented perspectives, which are based primarily on the measurement and comparison of

the material conditions of labour in isolation from the process of exploitation.[13] It also differs from a 'semi-relational' Weberian approach to class. The core distinction, for us, is that Weber, for all that he contributed in his wide-ranging analyses,[14] was more concerned with how control over productive assets shaped life chances than with how they 'structure patterns of exploitation and domination'.[15] While, like Marx, Weber saw the distribution of property as a fundamental determinant of class relations, he maintained that 'class situation' was 'ultimately market situation', and was internally differentiated by asset levels and skills, rather than exploitative social relations.[16]

Stratification-orientated perspectives on class are currently popular in trying to assess developmental transformations under contemporary global capitalism. For example, an influential body of work has emerged from across the political spectrum, which uses income-based definitions of class position to claim to identify an emergent middle class in the developing world.[17] From this perspective, work effort combined with firm-level productivity are presented as the main determinants of income, and hence class position (and mobility). This overlooks relations *between* classes and their global determinations, and does not consider, for example, how members of one class are able to determine how members of another socially reproduce themselves. Nor do they consider world-historical determinants of these classes' existence.[18]

Second, we understand class as *relational* and multifaceted.[19] As E. P. Thompson put it:

> class is not this or that part of the machine, but the way the machine works once it is set in motion—class is not this interest or that interest, but *the friction* of interests—the movement itself, the heat, the thundering noise…Class is a social and cultural formation (often finding institutional expression) which cannot be defined abstractly, or in isolation, but only in terms of relationships with other classes.[20]

The multi-faceted character of classes are formed in and through processes of competitive capital accumulation, and the antagonistic relations through which capital and labour shape and resist processes of accumulation and exploitation. These social interactions take place at different registers, meaning that classes are formed, interact and are reproduced *through relations with each other* on global, national, regional and local scales.

Whilst we see class relations under capitalism as being defined primarily by the production of surplus value, we emphasise how class dynamics cannot be understood in isolation from other 'relations of dominance and subordination'.[21] Gender and race are in part discrete from class, and in part mutually constituted with it.[22] This means that class analysis should not reduce gender or race to 'economic' categories as both have aspects that are discrete from class. Recognising that class relations articulate cultural and social as well as political and economic dimensions enables our purpose of exploring the diverse and open-ended modes of existence of class relations, and explaining why classes take particular historical forms.[23]

Third, classes have agency. By this we do not refer to an individual voluntarism that may sometimes coalesce into collective action. We refer instead to a dialectical process produced through the 'friction' of relations within and between multifaceted classes. These relations, which are located at different historical and spatial scales and mediated in a variety of ways, may, either in particular places or more widely, be expressed through overt collective action. Equally, agency may remain individualised, latent, concealed or discursive. Capitalists tend to have more means at their disposal to act collectively. Labourers are particularly constrained where the balance of class forces is tilted more heavily in capital's favour. Even in such cases, though, labour possesses agency, albeit often latent and hidden from view.

Multiple forms of agencies under capitalism are not mere personifications of the capitalist 'system'. Individual agencies actively shape material conditions.

But material conditions, which are the result of human activities past and present, in turn constrain agency. The infinite iteration of dialectical relations between human actions and material conditions is the process through which class formation and relations are to be understood, and leads to concrete social formations that cannot be read off from the immanent 'laws of motion' of capital[24]. Capitalism, or its multiple forms of agencies, do not necessarily follow the strict 'laws of motion' of capital. In ways that are elaborated upon in this special issue, capitalists and workers (and capitalist managers and the middle classes) shape the relations among them, whether in terms of geographies of production, distribution, exchange and consumption (e.g. where and why production takes place when it does), socio-technological change, administrative processes and (in)direct techniques of management by which 'the employee's effort is controlled by the employer',[25] and actual forms of the labour process. The social relations of work cannot be 'read off' from the structure of capitalism: similar patterns of production and labour exploitation are met by different types and degrees of class response in different places.[26] While surplus value is extracted from labour within the production process a focus on the employment relation is not enough to understand the full range and social complexity of class. Similarly, consumption behaviour is not only determined by the logic of valorising surplus labour, or by the reproductive needs of capital, but can be a site for segmentation and struggle. Further, institutions are transformed by collective agency as well as material conditions. Particular moments of collective action by a class are mediated by a whole variety of historical conditions, social and cultural practices. We elaborate on class politics in section 5 below, and other articles in this special issue analyse class dynamics in specific concrete situations.

Fourth, while class relations, their forms and trajectories, are socially open-ended rather than teleological and linear, class is a world-historical totality constituted through multiple scales. By recognising that classes are formed, relate and are reproduced through multi-scalar dynamics of capital accumulation, we

eschew 'methodological nationalism'. Rather, we emphasise the role of the state as an important (but certainly not sole) determinant in the formation of classes and their reproduction, whether macro-regionally, sub-nationally, 'locally', or at the level of the household. How relations of production actually operate and are expressed is, therefore, to be understood empirically within particular social and historical developments, including state intervention.[27]

Class understood in the way sketched here helps us to analyse, illuminate and explain the specificity and complexity of social formations, including in the 'global South'. The purpose of this research project is therefore not only to bring class back to the study of world development, but also to re-establish the depth and complexity in the concept of class present in Marx's method.[28]

2. The (re)production of surplus value

A first step in analysing class in Marx's method is to identify and define historical epochs according to the production and extraction of economic surpluses (and under capitalism, of surplus value). Of course, *historically* there are a multiplicity of forms of actually-existing class relations reflecting dynamic social complexity. But *analytically* our starting point is that capitalism can be defined in relation to the essential dichotomy of the two major classes, which are divided by the central antagonism in capitalist society over the production and appropriation of surplus-value – with all of its 'heat' and 'thundering noise'. On the one hand are those people, the capitalists, who own or control the means of producing social wealth; and on the other hand are those who need to sell their labour power to capitalists in order to secure their livelihoods. It is in the 'hidden abode of production'[29] that this essential class relation is crystallised.

At the level of the social totality of enterprises ('capital in general') surplus-value is produced through the labour process in generalised commodity

production. This is undertaken by the collectivity of 'productive' workers[30] – in the strict sense of those producing surplus value – where surplus-value is the realisation of the unpaid ('alienated') labour embedded in a commodity. The commodity itself must possess both use and exchange values and the surplus value contained within it is appropriated by the collectivity of capitalists.[31] *Value is understood here as socially necessary labour time*, which 'is context dependent and specific and as such variable over time/ space rather than … being an essentialized and invariant quantity'.[32] The concomitant class antagonism between owners of capital and sellers of labour-power is typified by the employer-employee relation, which is characterised by various degrees of unfreedom and forms of exploitation.[33] What matters most to us here – and what makes relations of production specifically *capitalist* – is its insatiable drive to accumulate and expand.

Labour process theory is a leading approach to understanding forms of exploitation, and how they vary over time and space.[34] A key insight of this theory is the fundamental *indeterminacy* of labour power: how effort in work and the expenditure of labour power are enforced cannot be determined prior to the labour process.[35] The workplace is a site where management applies particular strategies of control and workers resist. These struggles simultaneously reflect and contribute to broader societal class dynamics.[36] For example, variations between piece-rated wage-labour and daily-rated wage-labour have implications for the intensity of the labour process, the extent of the working day, the way in which labour is managed, and relations among workers, as well as the forms of and scope for class action.[37]

The interlocking of labour relations with debt relations is, for example, a particularly prominent way of accessing labour-power and keeping labourers in place.[38] Forms of intermediation through labour brokers/subcontractors allow capital to maintain 'remote control' or perpetuate informality by sidestepping labour legislation.[39] Within production processes, rates of exploitation are often

gendered with women paid less for similar tasks to those carried out by men, while 'male labour tasks' may be more rapidly and extensively mechanised than 'female tasks'.[40]

Class dynamics extend beyond the moment of production, and play out in the circulation of capital and through social reproduction. While surplus-value is ultimately based upon surplus labour time expended in the labour process, it is also appropriated outside the workplace and redistributed among a range of class actors including bankers, traders, landowners, capitalist managers and shareholders. Moreover, merchant, commercial and financial capital may in practice control and subsume production.[41] Therefore, while production, circulation and reproduction can be abstracted as distinct moments of the totality of capitalism, class analysis can be deployed in concrete situations, not only with respect to conflictual employment relations, but also in relation to a variety of struggles, including around tax, debt, pensions, education, religion, housing, access to 'natural' resources, amongst others. It follows from this that accusations of a 'productivist bias' are based on a major misconception of Marxist political economy (although, alas, not in all cases!).

The circuit of capital incorporates the sequence of relations wherein means of production (machinery and inputs) and labour power are brought together by capitalists, value is produced by labour and realised through exchange, and the circuit returns to 'its original qualitative starting form'.[42] However, through this process there is now a quantitative augmentation of value that is now the property of capitalists (surplus-value). As Marcus Taylor notes:

> Through the circuit of capital … each singular act of production enters into a disciplinary feedback loop with the social whole [capital in general], through which it must be socially validated by way of the sale of commodities.[43]

This does not suggest a mechanical return to the *exact* same point or even guarantee the re-initiation of the circuit. The starting point can never be the same

quantitatively because, for example, of the *exploitation* of people as labouring bodies and the effect of this process on physical and mental health; the *transformation* of material things as means or conditions of production (e.g. natural resource depletion, depreciation of fixed capital); and *class struggle* in the circuit either by labour for a greater share of the surplus-value (e.g. in the form of wages or improved working conditions) or, conversely, by capitalists to increase their rate of profit by exploiting workers more intensively and/ or extensively (e.g. through longer working hours) and/ or immiserating them (by pushing wages down).

The appropriated surplus-value may be used in a number of ways, including: to re-initiate the circuit to a greater spatial extent or intensity to extract a relatively greater rate of profit and/ or compete with other capitalists (e.g. capitalist innovations in relative surplus-value production such as new techniques, technologies and/ or forms of organisation); as a consumption fund for capitalists; to enable a shift to a new realm of production (start a new circuit based on a different commodity); and to absorb competitors (e.g. mergers and acquisitions).

The identification of the extraction of surplus-value in the immediate process of production, and its realisation, appropriation and distribution in circulation illuminates how capitalism is constituted through and by class struggles at and beyond the point of production.[44] The political implication of conceiving of class relations as based upon the (re)production and extraction of surplus value is to highlight an essentially antagonistic dimension of these relations. The identification of such antagonistic relations explains how struggles from above (by employers, often supported by states) to secure surplus value extraction, and from below against particular forms of exploitation and for the betterment of workers' conditions, are constitutive elements of the historical expansion, intensification and transformation of capitalism.[45] We turn now to

address in more detail the multi-layered and cross-cutting dynamics of class relations and struggles.

3. Inter and intra-class relations

A relational and multi-dimensional conception of class illuminates a broad range of social relationships within and between labouring and capitalist classes. While relations between capital and labour are essentially antagonistic, based upon surplus value production and appropriation, relations *within* these classes can be both collaborative *and* antagonistic. Capitalists compete bitterly against each other to accumulate but they also cooperate and collude to enhance the conditions of accumulation. Where an individual enterprise's ability to maintain or enhance the extraction of surplus value is threatened, it may revert to association with other enterprises, whether at the scale of a particular industry, sector, 'national economy', macro-region (e.g. the EU) and/or internationally (e.g. the WTO).

Despite the mutual hostility born of competition, by associating capitalists work through the state (or equivalent legal authority) against the articulations of class positions by labour around issues such as wealth redistribution (e.g. progressive tax reform and social policy) or political representation. While the state cannot be conceived of simply as an association of capitalists, association among a wide range of capitalists is particularly prevalent in support of regressive taxation, and the deregulation of finance and labour markets (to increase the rate of exploitation), and in opposition to measures that might reverse any of these (such as the 'cost' of maternity pay). This is not to suggest that the capitalist state necessarily functions on behalf of the interests of capital. States may indeed develop institutional practices which are relatively autonomous from *specific* class interests and struggles. However, this relative state autonomy is rooted in

capitalist relations of production and class struggle, even if the degrees and forms of autonomy vary historically, as we outline in Section 4[46].

Competition over the distribution of surplus-value also occurs at the level of individual enterprises ('many capitals'). The decomposition of surplus value into the abstract categories of industrial profit, interest, ground rent and 'gains made through trade'[47] helps us to think through the terrain of struggle among capitalists over value.[48] As is recognised by most theories of capitalism, competition is a major driver of change, but for most of these theories capitalist competition is an idealised abstraction[49]. For Marxist political economy, real-world competition between and among, for example, productive capitalists, bankers, landed property and commercial capitalists is over the appropriation of portions of value.[50] These decomposed categories of surplus are not independent sources of value. For example, ownership of land or a brand does not *create* new value, it represents a competitive *redistribution*[51] based upon the 'class function' of modern landed property and the capturing of value in the form of ground-rent.[52] And as was made clear with the 2007 financial crash and subsequent global slump, capitalist crises are important forms of 'competitive redistribution': both between capitalists (e.g. the most powerful investment banks securing their interests at the expense of the industry as a whole), and from the general public to narrow capitalist interests (e.g. the greatest transfer of wealth in human history in the form of bailouts and stimuli).[53]

Class locations, functions, and relations are often multidimensional. Through careful analysis it is possible to identify how such multidimensional relations can be embodied in one organisation. The abstract categories of surplus value and their class bases can rarely be divided into neat portions in practice, and the 'functions' of a particular class can be assumed by a diversity of actors.[54] For example, state ownership of an enterprise under capitalism does not necessarily remove the class contradiction between employer and employees, instead it may be the legal form and social location of ownership that has

changed.[55] Of course, legal forms have material implications for the historical specificity of class dynamics, as demonstrated in various contributions to this special issue, including the role of the state in the 'making' of the north Korean working class and the diversity of class mobilisations shaped by different evolution of labour politics in regions of India.[56] To take a different example, the colonial legacy of the institution of the chieftaincy in South Africa, while 'politically conditional', allows for a quasi-monopoly of access to valuable platinum reserves.[57] This is also apparent in the financialisation of production where manufacturing logics are shaped by financial ones, or in supermarket retail which, while on first glance is commercial capital, simultaneously combines the roles of modern landed-property vis-à-vis suppliers paying ground-rent to access the supermarket shelf, industrial capital vis-à-vis employees to maximise the rate of exploitation of their labour, and finance capital in relation to the use of cash flow to fund banking and insurance activities vis-à-vis consumers.

In this collection, the term 'labouring classes' indicates the manifold social and spatial segmentations of labour, and the many forms of its reproduction, while underlining a shared position as members of the exploited class. It refers to 'the growing numbers…who now depend – directly and indirectly – on the sale of their labour power for their own daily reproduction'.[58] In today's global South labouring classes 'have to pursue their reproduction through insecure and oppressive – and typically increasingly scarce – wage employment and/or a range of likewise precarious small-scale and insecure 'informal sector' ('survival') activity, including farming; in effect, various and complex *combinations* of employment and self-employment'.[59] This formulation is taken from Henry Bernstein's conception of 'classes of labour',[60] which is useful in a variety of 'developing' country contexts for the following three reasons. Firstly, it points to the scarcity of work, which indicates the presence of a reserve army of labour that 'disciplines and disempowers those in work, discouraging them politically from struggles over the distribution of wages and profits'.[61] Secondly, it points to the

often oppressive, insecure, and informal nature of labour relations, thereby flagging poor working conditions and state collusion with capital in keeping labour relations predominantly unregulated in order to lower labour costs and increase competitiveness.[62] Thirdly, as noted, it captures the segmentation of labourers across multiple sites of production while underlining their shared position as members of an exploited class.

Labouring classes are not only segmented by gender, race, and ethnicity, but also by location, sector, task and wage, skill level, type of contract, and by whether or not they remain in a place or pass through it. Segmentation reflects dynamics of accumulation and various aspects of class relations including their interplay with patriarchy, and broader and more workplace-specific capitalist strategies (wage differentiation, for example, or the rotation of workers to impede emerging solidarities). The spatial segmentation of labouring classes is increasingly significant because many, and in some countries most, labouring class households now reproduce themselves across a number of locations. Many combine wage-labour with various types of self-employment, either permanently or periodically as the availability of wage-labour shrinks, and more workers are chasing fewer jobs. Petty commodity producers occupy a continuum of positions that straddle the capital-labour divide.[63] Some may buy labour-power relatively often, and tend to produce small surpluses, and so are in the process of becoming petty capitalists (though not usually in a linear or predictable way). Others do not produce surpluses or hire labour-power. The latter, and many of the former, may combine petty forms of self-employment with selling their labour-power, so positioning themselves within the ranks of the labouring class. Which predominates in a given context is an empirical question to be pursued across a range of social settings.

4. Development: Class formation, domination, conflict

One of the objectives of our contribution in this article and the special issue is to illuminate how evolving class relations and development processes are globally constituted. Capitalist competition and class struggle have shaped the globalization of value-relations, contributing to class formation and shaping development processes and experiences within and between countries. This process has involved slavery, mass slaughter, colonisation, the deliberate destruction of competing industry, and the ongoing transfer of surplus towards rich countries and the wealthy within poorer countries.[64] The 'gravitational tendencies' of capitalist competition drive three trajectories of historical capitalism: (i) extensive development into new geographies, (ii) intensive development through the commodification of new realms of human and non-human life, and (iii) the mass appropriation of unpaid work and energy from humans and non-humans (e.g. forests, geo-physical formations, soil) upon which the circuit of capital and labour productivity depend but do not value.[65]

In the context of these trajectories our starting point is that class conflicts are *constitutive of* capitalist development, in particular in the formation of employable/exploitable workforces. Marx's analysis in *Capital* Volume 1 of the expropriation of the English peasantry from the late fifteenth century onwards demonstrated how large-scale, long-term and coordinated struggles from above (waged by the English state and the emerging capitalist landlord class) were the precondition for systematic competitive capital accumulation. The dispossession of the peasantry was necessary in order to establish a large pool of 'free' wage labourers. During the sixteenth and seventeenth centuries, Europe-wide witch-hunts were one of the most dramatic elements of the (re)production of patriarchy, which systematically excluded women from waged-work, deepened their legal subordination to men, and subjugated their bodies 'into a machine for the production of new workers'.[66] Subjugation of labour for accumulation is reproduced globally in other historical and contemporary experiences of capitalist

development, albeit with varied forms of exploitation, layered relations of domination and subordination (e.g. race), and in different trajectories, as analysed in this special issue.[67]

Class-relational political economy can illuminate and explain how class struggles are central to development processes. For example, Robert Brenner, in analysing the break-down of European feudalism in the fourteenth and fifteenth centuries, argues that we can comprehend the varying agrarian transitions and political economic regimes that emerged from it only as 'the outcome of processes of class formation, rooted in class conflict'.[68] He demonstrates how the English peasantry resisted the seigniorial reaction, thus killing off feudalism, while in Prussia the opposite occurred, with the enserfment of what had previously been one of the freest peasantries in Europe.

Despite the importance of this line of argument, class-relational political economy must be wary of methodological nationalism and should not rely solely on either 'internalist' or 'externalist' explanations. Both Brenner and Maurice Dobb (1946) before him declined to situate their accounts of the transition to capitalism in the context of worldwide processes of the development of the world market, colonial produce trades and generalised dynamics of appropriation of unpaid work and energy from humans and non-humans.[69] As Marx wrote so vividly in C*apital*:

> The discovery of gold and silver in America, the extirpation, enslavement and entombment in mines of the aboriginal population, the beginning of the conquest and looting of the East Indies, the turning of Africa into a warren for the commercial hunting of black-skins, signalled the rosy dawn of the era of capitalist production. These idyllic proceedings are the chief moments of primitive accumulation.[70]

At the same time, explanations for the emergence of the capitalist world system based on the pre-existence of a world market [71] are equally unsatisfactory as they

fail to explain the initial formation of a socio-economic system organised around surplus value production and extraction.

The poles in the 'transition' debate remind us of the importance of Marx's method and the challenge of disentangling different levels of abstraction, which we outlined in Section 1. Marx deployed 'mode of production' as a particular articulation of forces and relations of production at a highly abstract level in order to characterise historical epochs in their broadest sense (or 'essence') in terms of surplus production and appropriation. As both Haldon and Banaji point out, the level of abstraction at which the mode of production can be meaningfully used must be distinguished from concrete 'social formations'.[72] The dispossession of the peasantry in England was but one, interlinked, moment in the transformation of global class relations which ushered in generalised commodity production. Attention needs to be paid to geographically uneven and politically unequal processes of primitive accumulation, which to some considerable degree shape contemporary geographies of capitalist expansion.

Class struggles waged from above by capitalist classes (with and through the state and the state system) to (re)produce an exploitable labour force are an ever-present feature of capitalism. Indeed, much of what is described as the 'development process' is part and parcel of subjecting labouring classes to particular forms of (exploitative) work relations: widely documented in recent years across various regions, countries and localities from the garment factories of Bangladesh to the supermarkets of the United States, from the coltan mines of Democratic Republic of Congo to the iPhone producing factories of China, from the rice-fields of Indonesia to the brick kilns of India, and from Philippine seafarers to the logistics workers of Britain.[73]

Class relations are mediated in a number of ways through the agency of capitalists and labourers acting individually or collectively. States are central players driving the intensive and extensive development of capitalism. Historically, states tend to act in the interests of capital, but not necessarily on

behalf of individual capitals. In supporting the broader goals of capitalist development, the state not only attempts to support the accumulation strategies of capitalists, but also has to maintain social stability and ensure that labour can reproduce itself and make its labour-power available as cheaply as possible. In other words, states can have longer-term approaches to supporting processes of capitalist accumulation than capitalists. This may bring it into periodic conflict with the short-term interests of capitalists in general, or with particular fractions of capital – some of which permeate state institutions and shape the actions of the state more than others. In democracies these dynamics are made more complex still by governments seeking re-election. To seek re-election, state managers may steer a greater share of public resources towards labour, or they may even press capitalists to temporarily forego a share of their profits. While representing the interests of capital in broad terms, then, the state can also maintain a relative degree of autonomy from it. To elaborate, while the state is based on prevailing relations of production and class antagonisms, its particular historical form and the degree to which it is bounded by class interests are empirically open, including the possibility of what Hilferding termed the 'automization of the state interest' in particular historical moments.[74] This means that relations between capital and the state are less straightforward than the polemical assertion that the state is the 'executive of the bourgeoisie' implies, and require historical analysis.

Across much mainstream literature concerned with development, class conflicts are portrayed as disruptions to, or derivations from, potentially benign processes of change. Within the 'developmental state' literature for example, the (strict) management of labour is identified as a prerequisite for fast economic growth and structural change. By conceiving of class conflict from below as a disruption to the development process the (often intended) effect is to ideologically delegitimise such struggles whilst naturalising, justifying and removing from analysis those from above. Within much developmental state literature the manipulation of the labour force is presented in

technical/managerial terms – as part of a broader function of state capacity, innovative entrepreneurialism and capitalist dynamism.[75]

Indeed, 'developmentalism' is based on the often brutal intensification of the exploitation of labour. Statist approaches to development tend to argue for a more 'historical' understanding of the role of the state in processes of industrialisation, but often do so while ignoring or declining to investigate and/or theorise the class bases of the developmental state. This is most glaringly apparent in South Korea where industrial female and male workers were repressed and systematically exploited before rising up in the 1980s to overthrow dictatorship.[76] Many of these industrial workers are now in regularised work having benefitted from their historic struggles through relatively high wages and stability of employment. However, in parallel the Korean state has mediated the interests of capitalists by providing the legal bases for expanding the *irregular* workforce, who are sometimes even working on the very same production line as regular workers. Irregular workers in Korea are not represented by trade unions and count a disproportionately large number of women among their ranks.[77] While perhaps less idealised than in popular political sociologies of South Korea, capitalist accumulation as a process of subsumption and subjugation of labour is replicated in many concrete forms in different historical and contemporary circumstances. This snap shot, however, illustrates that class analysis can be used to simultaneously challenge received wisdom in mainstream development theory (e.g. on the developmental state), and to avoid romanticised notions of the working class (e.g. by examining differential dynamics within labouring classes).

5. Class struggle and human development

The inherently antagonistic relation between capital and labour finds expression in various forms of agency: individual and collective, latent and active, overt and

covert, and momentary and sustained. The agency of social classes is shaped by intra- and inter-class relations, and is interwoven with other axes of social difference such as gender, ethnicity and caste in ways that may constrain or facilitate its realisation.

The capitalist class, in its many guises and through its many scales of operation, imposes itself more readily upon its relations with labour than labour does. Capitalists compete with one another but, as noted above, they also collude in a variety of ways and with varying degrees of opaqueness – through trade associations and industry federations, and through the state institutions and inter-governmental bodies over which they exercise disproportionate influence.[78]

Capitalists are not the only personification of capital. Capitalist agency is mediated on a daily basis by management.[79] Management techniques and the organising of work and working lives shape technical, social and spatial divisions of labour. Management introduces new technologies to intensify and extend the labour process and, through the state and system of states, reconfigured global production from the 1970s to counter the emergence of militant working class struggles in the global North.[80] Management tactics are often responses to labour finding ways to open up moments of resistance, respite, resilience or reworking in the production process,[81] but they are also deployed to enclose and valorise knowledge and skills developed elsewhere.[82] Other tactics are cruder, involving the use of debt to restrict labour's freedom to move between sites of wage-employment, or, in some cases, to prevent freedom of movement altogether. Other directly repressive tactics are designed to disrupt the agency of labour, and include the co-option of labour leaders, or attempts to curtail the political impact of freedom of association through legal means.

The forms and contexts of capitalist agency shape the ways in which labour acts, though without determining them, as discussed below. Where capital resorts to crude acts of violence to weaken labour (as in Colombia or Honduras, for example) labour depends on transnational alliances in its attempts to repel the

onslaught. Where labour seeks regulatory redress, it may be compromised by a state's lack of relative autonomy from the capitalist class (for example, in Bangladesh).[83]

As well as engaging indirectly with capital through the state (in struggles over the distribution of public resources or attempts to increase the regulation of workplaces), labour may engage directly with capital through confrontational means, or as part of processes of compromise and cooperation. As Lebowitz notes, workers' collective gains against capital can be won through 'negating competition, [and] infringing on the "sacred" law of supply and demand and engaging in "planned co-operation"'.[84] Such collective actions, capitalists' responses to them, and the institutional formations that occur subsequently, can engender the more progressive features of capitalist development, such as workers' rights, welfare provision, and various forms of democracy.

The ability of labouring classes to act collectively in their interests depends on a range of variables including the global commodity chain that they work within and where are they are located within it, dynamics of competitive capitalist accumulation, and class relations at a number of levels from the world-historical to the labour process itself. Hence unionised grape-pickers in north-east Brazil use their proximity to western supermarkets to leverage for better working conditions,[85] while migrant construction workers and agricultural labourers, who are often highly segmented and scarcely visible at the margins of global production networks and accumulation processes, lack 'structural' and 'associational' power.[86]

As well as varying strategies, labouring class organisational forms vary substantially (in large party-linked unions, for example, or smaller less formal organisations). Where the objective of unions is to extract concessions from capital in order to ease material conditions or marginally re-work the distribution of power, collective labouring class action can help to reproduce capitalist social

relations of production by generating stable conditions for accumulation. Elsewhere, though, it may challenge these conditions, or seek to transcend them.

While problematic when seen as an end-in-itself rather than a means of moving towards more fundamental systemic change, the seeking of concessions from capital (either directly or through the state) should not be undermined as a labouring class strategy because it can generate gains in labour's material conditions and strengthen its political position. Such gains include better working conditions, greater well-being, higher wages, and heightened levels of welfare protection. They may also partially re-structure the state and alter its political-economic priorities. In some circumstances they can institute new forms of political-economic rule. Labouring class struggles have been (and we expect them to continue to be) determinants of changes in technology and technique, industrial organisation and location on a global scale, and even the development of particular energy regimes, with all of their political consequences.[87] To side-line class relations and the agency of labour is to truncate and distort our comprehension of processes of global development and change.

Class struggle and forms of control are gendered in a variety of ways – not least through all too frequent acts of sexual harassment. Intra-class relations may also marginalise women workers. Patriarchy in the sphere of reproduction may compromise women's ability to act collectively, while trade unions are often dominated by men. Nevertheless, women do of course mobilise in a variety of ways even where they face multiple barriers,[88] and with their increased participation in 'formal' work collective action by women has become increasingly widespread.[89]

The agency of capitalist and labouring classes is also shaped by a variety of forms of social difference including ethnicity and caste. For example, ethnicity marks relations between capitalists in Indonesia, and among labourers in Bolivia.[90] Meanwhile, caste differences impede the agency of both capitalists and labour in India, while caste unity often facilitates it by thickening social ties.[91]

While the more dramatic moments of labouring class agency may catch the eye, it should be underlined that labouring class agency is often barely visible. More often than not it is confined to 'everyday forms' of agency that take place on an individual basis or among small groups.[92] Acts of petty theft may increase a household's consumption of foodgrains, or slow down technological change.[93] Taken alone such acts are of little significance, but repeated over time and space, they may have notable impacts on material conditions – albeit without so much as indenting broader structures.

Everyday forms of action are not necessarily discrete from broader more overt forms of agency. Where labourers are unwilling to openly critique capital, instead revealing their consciousness through intimate knowledge of everyday forms of oppression in 'hidden transcripts' expressed to close associates, they are less likely to act collectively.[94] Even here, though, the potential for labouring class agency should not be dismissed. Years of exploitation and domination, seemingly passively absorbed, can suddenly be expressed through wildcat strikes or moments of revolt.[95]

These various forms of consciousness and agency can be situated in the ongoing re-configuration of class relations across the globe. This has seen a greater consolidation of the power of capitalist classes, while also generating the simultaneous expansion and fragmentation of the world's labouring classes. Wealth (appropriated from 'the rest' in both the global North and South), has been concentrated to the extent that the world's richest 0.001 percent now control more than 30 percent of global financial wealth.[96] Corporate executives and top managers are accumulating personal wealth from the organisations in which they work at unprecedented rates for their occupational status, which 'along with the authority they exert over the labour process, clearly identify them as members of the capitalist class'.[97]

Meanwhile, the labouring class has grown. Over the last 40 years, there has been a widespread processes of 'de-peasantisation', as is perhaps most readily

apparent in contemporary China where tens of millions of left the countryside for the towns between 1980 and the mid-2000's in 'the largest migration in world history',[98] and in India where over 50 million are estimated to be circular migrants moving between city and countryside[99]. This has contributed to an expansion of the industrial working class across the global South. The ILO calculates that the percentage of the world's industrial labour force located in 'less developed regions' expanded from 34 percent in 1950, to 53 percent in 1980, to 79 percent in 2010.[100] At the same time, as already discussed in section 3, there has been the expansion of the numbers of the under- and unemployed, and of informal and precarious work. As Davis puts it '[t]he global informal working class….is about one billion strong, making it the fastest-growing….social class on earth'.[101] To what extent the labouring class transcends its many divisions and particular experiences of political, social and cultural repression remains an open question.

6. Conclusions

This methodological note and the other articles collected in this special issue aim to demonstrate and explore the value of class analysis in comprehending processes of development and change. It is our contention that the renewal of class-relational analysis must play a central role in the ongoing critique of global capitalism and its myriad forms of exploitation. Class analysis can be developed and deployed at multiple levels of analysis and in diverse historical and geographical contexts. Mediating the steps between the abstract categories of Marxist political economy (the 'essence' of capitalist dynamics) and the concrete (the infinitely complex) is simultaneously one of the strengths and challenges of historical materialism. We seek to open-up class analysis, not to hermeneutically seal it, and, as we hope this special issue shows in practice, this allows for the unpicking of a broad range of social relationships and their effects.

Much mainstream development thinking ignores class relations and (perhaps intentionally) delegitimises the actions of labouring classes to ameliorate their conditions. This introductory article and the contributions to this special issue demonstrate how class relations are central to development processes, and illuminate how collective actions by labouring classes for their amelioration deserve more academic attention and political support.

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[1] The authors wish to thank Jairus Banaji, Ray Kiely and Bridget O'Laughlin for their helpful comments and insights on an earlier draft. The usual disclaimer applies.

[2] In addition to the editors and contributors to this special issue, the HMWDRS has included Sam Ashman (Corporate Strategy and Industrial Development, University of Johannesburg), Elena Baglioni (School of Business and Management, Queen Mary, University of London), Gavin Capps (Society ,Work and Development Research Institute, University of the Witwatersrand), Penny Howard (Maritime Union of Australia), and Kristian Lasslett (School of Criminology, Politics and Social Policy, University of Ulster).

[3] Marx, *Grundrisse*, 101.

[4] These forms matter – they are not simply 'functions' of the capital-relation. For example, prices, while a phenomenal representation of value, have real effects.

[5] Shaikh, *Capitalism*, 5

[6] Banaji, *Theory as History.* See also Kelly (1985: 32. Emphasis ours) who argues that to understanding the ever-changing division of labour we must 'consider the possible role of competition between capitals, as well as conflict between labour and capital'. In other words, 'we need to consider the full circuit of industrial capital as the starting point for analyses of changes in the division of labour: purchase of labour power; extraction of surplus value within the labour process; realisation of surplus value within product markets. *There is no sound*

theoretical reason for privileging one moment in this circuit – the labour-capital relation within the labour process – if our objective is to account for changes (or variations) in the division of labour.'

[7] Knights and Willmott, *Labour Process Theory*; Fine, *Labour Market Theory*.

[8] Marx, *Capital* Vol. 1: 100-108; Croix, *Class Struggle in the Ancient Greek World*; Wood, *Democracy Against Capitalism*; Bensaïd, *Marx for Our Times*.

[9] Gooptu and Harriss-White 2001. And of course, capital may seek to externalise 'costs' such as healthcare where they have been socialised, e.g. O'Laughlin, "The Production of Affliction"

[10] Harvey, 'The "New" Imperialism'.

[11] Bourdieu, *Logic of Practice*.

[12] Bensaïd (2002) demonstrates how Marx developed and articulated the many determinations that make-up the totality of capitalism over the course of the three volumes of *Capital* (and elsewhere). The relation of exploitation in the sphere of production, the central focus of volume one, presupposes the labourer to be separated from the means of production, and thereby becoming a buyer and seller of commodities; the latter is a different level of analysis and is articulated in volume two. Exploitation presupposes the social division of labour, through which labour power is in circulation. But the social division of labour is also a consequence of the distribution of surplus value in reproduction as a whole, which belongs to the level of analysis unfolded in volume three. Exploitation cannot take place without the determination of socially necessary labour time which is a result of the overall dynamics of capitalist competition. Finally, as feminist political economy teaches us – none of this can happen without social reproduction and the unpaid labour that is characteristic of this realm of life under capitalism. Note that these 'determinations' and concepts are theoretical abstractions and cannot be overlaid in a 'blueprint' manner in the analysis of empirical reality. For example, wage-labour can be found empirically in a variety of forms, including being 'disguised' as self-employment, as contended by Banaji (2010) and Bernstein (2010), amongst others – see also contributions by Dinler, Mezzadri, Pattenden, and Pérez-Niño all in this special issue.

[13] Wright, "Understanding class".

[14] Weber, *Economy and Society*.

[15] Wright, "Foundations of a neo-Marxist class analysis", 25; see also Breen, "Foundations of a neo-Weberian class analysis", 33-34

[16] Weber, *Economy and Society*, 927-9

[17] Ravallion, "The developing world's bulging…middle"; Kapsos and Bourmpoula, "Employment and Economic Class".

[18] Our approach to analysing developing world middle classes would focus less on income and more on the specific relations between these classes and those 'above' them (capital) and those 'below' them (labour). An initial analytical starting point might be to adopt Erik Olin Wright's (1985) argument (for 'developed' countries') that middle classes are often reliant on the sale of their labour power (like workers) but enjoy significantly different working conditions (including more autonomy, higher wages, and often some managerial powers). These combinations of class relations and working conditions generate 'contradictory class locations', which disable any simple deductive conception of middle class 'interests' and politics. An important area for contemporary class analysis (the beginnings of a research hypothesis as it were) could be to investigate a) ways in which evolving capitalist dynamism has in fact given rise to new developing world middle classes, and b) where it has, the extent to which they correspond to Wright's observations.

[19] Wood 1995, *Democracy against Capitalism*; Bensaïd, *Marx for our Times*; Wright, "Understanding Class".

[20] Thompson, 'The Peculiarities of the English', 357

[21] Hall, *Race, articulation and societies*, 325

[22] In this volume see Mezzadri on gender and class; Pattenden on caste and class; and Webber on ethnicity and class.

[23] James, *Black Jacobians.* See also all contributions in this volume

[24] Sartre, *Critique of Dialectical Reason*; Laing and Cooper, *Reason and Violence*.

[25] Baldamus, *Efficiency and Effort*, 1

[26] Koo, *Korean Workers.*

[27] Thompson, *The Making of the English Working Class*; Wood, *Democracy against Capitalism*; Bensaïd, *Marx for our times*

[28] Haldon, *The state and the tributary mode*; Anderson, *Marx at the Margins*

[29] Marx, *Capital*, 279

[30] Here we are referring to labour in the abstract (i.e. in the social division of labour at the global level), as distinguished from concrete labour which emphasises 'the quality of … productive activities … in specific social, cultural, and institutional contexts that include the relationships and institutions through which labour forces are reproduced and put to use' (Taylor 2008: 536).

[31] Marx, *Capital*
[32] Hudson, "Cultural Political Economy", 426
[33] Banaji , *Theory as History*; Rioux, "The fiction of economic coercion".
[34] Braverman, *Labor and Monopoly Capital*; Brighton Labour Process Group, 'The Capitalist Labour Process'; Burawoy, *The Politics of Production*; Kelly, 'Management's Redesign of Work'.
[35] Knights and Willmott, *Labour Process Theory*; Smith, 'The Double Indeterminacy of Labour Power'; and Thompson and Smith,'Waving, Not Drowning'. Also see Baldamus, *Efficiency and Effort*, which is a seminal work on how human 'effort' and labour 'efficiency' are psychologically complex and unstable, involving dichotomous elements such as impairment and inurement; tedium and traction; and weariness and contentment. The authors acknowledge Jairus Banaji for this reference.
[36] Dinler; Miyamura; Pérez-Niño; Selwyn, all this volume
[37] Kapadia, *Siva and her sisters*; Pattenden, this volume
[38] Breman and Guerin, "Of Bondage old and New".
[39] Breman, 'The Study of Industrial Labour in Post-colonial India'.
[40] Hart, *Power, Labor and Livelihood*; Van der Loop, *Industrial Dynamics*.
[41] Harriss-White, *India working*; Banaji, *Theory as History*
[42] Hudson 2008: 423, see also 436
[43] Taylor, 'Rethinking global production', 536
[44] Harvey 1989
[45] Croix 1981: 43-44
[46] See also Haldon, *The State and the Tributary Mode of Production*, pp. 35-38.
[47] Marx 1981: 709
[48] These are abstract, qualitative categories that highlight intra-capitalist class dynamics. They need to be mediated by ever-growing levels of social complexity when examining concrete relations and historical dynamics. For example, Marx deployed the category of 'lease price' to refer to ground rent in its phenomenal form because actual payments by capital to landed property may include more than surplus profits. For example, actual payment of ground-rent can contain 'foreign component[s]' such as a landlord's capture of a portion of the average profit and/or of normal wages (Marx 1981: 763).
[49] Palermo 2016; Shaikh 2016
[50] We put emphasis on capital and labour in this intro as equally important to understanding capitalism, but we recognise that the articles published in this special issue are mostly on labour. The work of other contributors to the HMWDRS such as Sam Ashman, Liam Campling and Gavin Capps, is more centred on capitalist classes and their accumulation strategies, but were unable to submit articles to this collection.
[51] Harvey 2006; Christophers 2010
[52] Neocosmos 1986
[53] Thanks to Jairus Banaji for reminding us of this point. The phrase 'competitive redistribution' is his. McNally, *Global Slump*, estimates the total global bailout and stimulus at 20 trillion US dollars.
[54] Serfati 2013; Neocosmos 1986
[55] Capps 2016
[56] See Miller and Miyamura respectively, this volume
[57] Capps 2016
[58] Panitch and Leys 2001, 1x.
[59] Bernstein, "Who are the 'people of the land'", 5
[60] Bernstein, "Is there an agrarian question?".
[61] Harriss-White 2006, "Capitalism and Poverty", 1243
[62] Harriss-White 2010
[63] See Dinler and Pérez Niño, both this volume
[64] Byres 2016; Shaikh 2016; Wolf 1982
[65] Fine 1994; Moore 2015; Palermo 2016
[66] Federici 2004, 12
[67] See especially, Miller; also, Bernstein, *Class Dynamics of Agrarian Change*; Byres, 'In Pursuit of Capitalist Agrarian Transition'.
[68] Brenner 1977: 78
[69] Banaji 2016; Moore 2015
[70] Marx, *Capital*, 915
[71] Stemming from Sweezy 1950 onwards.
[72] Haldon (1993) and Banaji (2010)
[73] Applebaum and Lichtenstein,"And accident in history"; Baud and Durand, 'Financialization'; Nest, ‚Coltan'; Chan, "A Suicide Survivor"; Guerin, "Bonded Labour"; Hart, *Power, Labor and Livelihood*; Walters and Baily, *Lives in Peril*; Newsome, 'Work and Employment'

[74] In extracts translated by Bottomore, *Modern Interpretation of Marx*, and by Banaji, 'Exerpts from Hilferding's Unfinished Project', Hilferding refers to the state as an independent power and actor in history. Thanks to Jairus Banaji for the suggestion.
[75] Selwyn 2009
[76] Koo, *Korean Workers*
[77] Draws from interviews by Campling in Seoul in January 2016 as part of an ESRC-funded project entitled 'Working Beyond the Border: European Union Trade Agreements and Labour Standards' (award number: ES/M009343/1). The project involves collaboration with Mirela Barbu, Adrian Smith (Queen Mary University of London), James Harrison and Ben Richardson (Warwick University).
[78] See, for example, Miliband, *The State in Capitalist Society.*
[79] See Hanlon, *Dark Side of Management*, for a critical take on the history of management theory as a tool of class power. Thanks to Jairus Banaji for encouraging us to emphasise this point.
[80] Glyn, *Capitalism Unleashed*
[81] Katz, *Growing up Global*; Fischer, *Labour Regimes*
[82] Hanlon, 'The entrepreneurial function'. See Skeggs and Yuill, 'Capital experimentation', on Facebook's tracking technologies used to appropriate ground-rent by selling information and access to advertisers on 'high net worth' users of its platform.
[83] For example, Anner, 'Labor Control Regimes'.
[84] Lebowitz 'Beyond Capital', 67, citing Marx.
[85] Selwyn, 'Labour flexibility in export horticulture'.
[86] See Wright, 'Working-Class Power'.
[87] Silver, *Forces of Labor*; Malm 2013; Mitchell 2011
[88] E.g. Scott, *Weapons of the Weak*; Wilson, "Patterns of accumulation".
[89] Chan, "A suicide survivor"; Sridhar, "Class outburst"..
[90] See Robison, *Indonesia* and Webber, this volume, respectively
[91] Kapadia, *Siva and her sisters*
[92] Scott, *Weapons of the Weak*; Kerkvliet "Everyday Resistance".
[93] Scott, *Weapons of the Weak.*
[94] Pattenden, this volume. The term 'hidden transcript' is taken from Scott, *Domination and Arts of Resistance*.
[95] Sridhar, "Class outburst"; Zola, *Germinal.*
[96] Serfati (2013) and Sayer (2015)
[97] Serfati, 'The new configuration of the capitalist class', 145.
[98] Buck and Walker, "The China Road", 42.
[99] Breman, *At Work in the Informal Economy*; Deshingkar and Farrington, *Circular Migration*, 9.
[100] Smith, 'Imperialism', 102.
[101] Davis, *Planet of Slums*, 178.