

A SYSTEMATIC REVIEW OF ENTERPRISE2.0 AND ITS RELATIONSHIP WITH ORGANISATIONAL DEMOCRACY

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0. INTRODUCTION

This paper will outline the approach and findings from a Systematic Literature Review of Enterprise2.0 and its relationship with Organisational Democracy. The findings from this Systematic Review will inform a subsequent Empirical Research Project.

The organisational problems that stimulated this research may be summarised as: (a) The disconnection between leaders and workers in organisations, and the perceived need to engage in meaningful conversations and (b) The tension created by the conflicting desires of leaders to introduce Organisational Democracy, whilst at the same time needing to retain Power and Control.

Since corporate organisations are experimenting with Enterprise2.0 as a means to engage leaders and workers in meaningful conversation and to address the perceived disconnect, this is seen to be an important topic, a view that is supported in the practitioner literature. An initial review of Academic literature, completed at Scoping Study suggested that there is little knowledge as to how Enterprise2.0 may enhance Organisational Democracy or what challenges may exist, although it did highlight the tensions and difficulties encountered in other forms of Organisational Democracy.

1. METHOD

A strict process was adopted for the Systematic Review, and this is outlined in the Review Protocol. A short summary will be included here.

The Systematic Review (Tranfield, Denyer and Smart, 2003; Duff, 1996) is built on the evidence-based approaches in medical science and healthcare and latterly in developing evidence-based policy. The approach provides a rigorous framework for undertaking a Literature Review, and these stages are shown in Figure 1. This section will also include a brief discussion on the specific application adopted in this study.

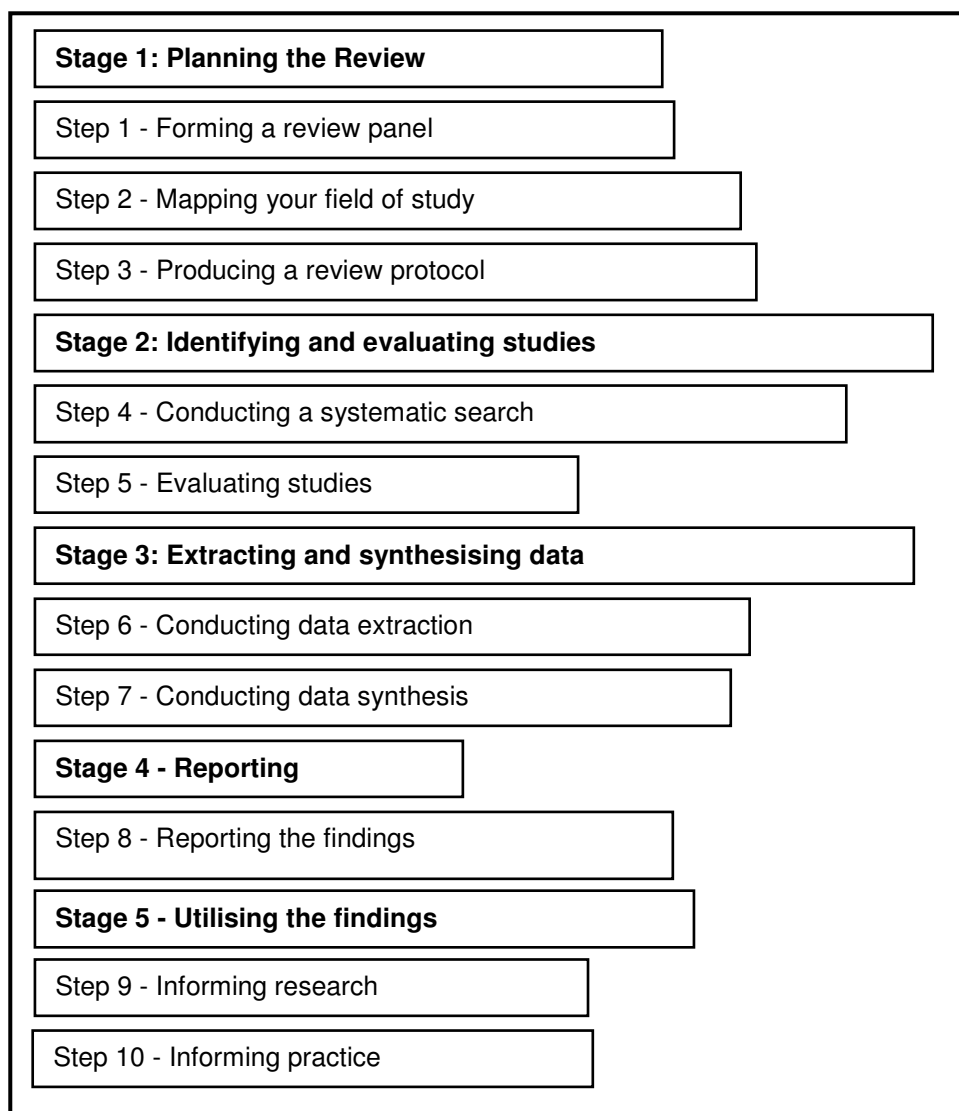


Figure 1 - Stages of Systematic Review

Stage 1: Planning the Review

Initially an 'extended' panel was formed recognising the various contributions that may be required to support the Systematic Review process. As well as including the core supervisory panel, thought was given to the other individuals who might make a contribution, whether scholarly, procedural, or advisory (e.g. field practitioners). During the Review, the use of this 'extended' panel was in fact restricted to the immediate panel and those offering 'technical' support with respect to searches and sourcing of literature. The wider panel were not engaged for a number of reasons. In general, it was not, upon reflection, clear precisely what support was being sought and so questions of relevance and focus arose. In addition, a number of the individuals were likely to be contacted as part of the later empirical project, and it was felt that early engagement and here questions of possible bias, validity and reliability arose as did the issue of researcher-practitioner conflict and inadvertent intervention.

Based upon findings from Scoping Study, the field of study was mapped and included Organisational Democracy, Organisational Politics and Power. Since the purpose of this research is to look at the relationship between Enterprise2.0 and Organisational Democracy, Technology is also included in the mapping activity.

Finally, an extensive Review Protocol was produced. This protocol summarises learning and findings up to the point of the Review, includes the field mapping, lists the 'extended' panel, provides a personal statement, lists Review Questions, defines the Search Strategy (comprising keywords, search strings and sources), lists Primary (for assessment of title, and abstract) and Secondary (for full texts) inclusion and exclusion criteria, outlines potential sources, lists the specific quality appraisal criteria to be applied, describes the data extraction template that will be used, outlines the Synthesis approach, and proposes a project plan. This protocol was tested, and subsequently agreed with the supervisory panel prior to the Review beginning.

Stage 2: Identifying and evaluating studies

As part of the protocol, and informed by prior Scoping Study work, a set of Keywords, Search Strings and Sources were identified. Initially, a set of Keywords were defined. These are shown in Figure 2.

<p><u>ORGANISATIONAL ACTORS</u></p> <p>Executive Senior Manager Director Leader Board member CEO Boss Management Supervis* Worker Employee Operative Workforce Work force Subordinate Sub-ordinate Follower Team Workgroup Work group</p>	<p><u>POWER & CONTROL IN AN ORGANISATIONAL CONTEXT</u></p> <p>Authority Influence Power Control Conflict Command* Dominat* Repress* Restrains* Suppress* Anarchy</p>	<p><u>POLITICS IN AN ORGANISATIONAL CONTEXT</u></p> <p>Organizational democracy Organizational politics Workplace politics Emancipation</p>
<p><u>TECHNOLOGY</u></p> <p>Enterprise2.0 Enterprise 2.0 Web2.0 Web 2.0 Social network* Wiki Blog</p>	<p><u>ORGANISATIONAL DEMOCRACY</u></p> <p>Organizational democracy Shared leader* Distributed leader* Collaborative leader* Autonom* workgroup* Worker co-operative Worker cooperative Labor managed Labour managed Adhocracy Autocra* Egalitarian</p>	<p><u>LEADER-WORKER RELATIONS</u></p> <p>Employee involvement Employee engagement Employee empowerment Employee participation Employee collaboration Employee representation Worker involvement Worker engagement Worker empowerment Worker participation Worker collaboration Worker representation</p>

Figure 2 - Search Keywords

It is the lower keywords that formed the core of the Systematic Review since the upper keywords primarily address aspects covered during Scoping Study.

A series of Search Strings were then developed utilising these Keywords and pilot searches were undertaken to test validity.

The Search Strings used in this study were as follows:

ORGANISATIONAL DEMOCRACY and LEADER-WORKER RELATIONS (OD-LWR)

TECHNOLOGY and LEADER-WORKER RELATIONS (T-LWR)

TECHNOLOGY and ORGANISATIONAL DEMOCRACY (T-OD)

Each of these searches was undertaken on each of three databases with discrete options selected.

Upon advice from the supervisory panel, searches were also undertaken on the Psycinfo database, a specialist Psychology database. A sub-set of the **TECHNOLOGY** search string was used – with searches for 'enterprise2.0', 'enterprise 2.0', 'web2.0' and 'web 2.0' undertaken.

Figure 3 summarises how each search was undertaken on each database.

	Extent of Search:	Fields Searched:	Search Options:
ABI/Inform Trade & Industry (Proquest)	Full Search Strings	Citation and Abstract	Scholarly Journals
Business Source Complete (EBSCO)		All Fields	Scholarly (Peer Reviewed) Journals
Wiley Interscience		Full Text / Abstract	Journals
Psycinfo	Restricted Keyword Search	Quick Search	Social Science Technology Peer Reviewed Journals

Figure 3 - Database Search Options

Once searches had been completed, a series of Inclusion and Exclusion criteria were applied. These comprised Primary Criteria, applied at Title and Abstract level, and Secondary Criteria, applied to full texts. These criteria were informed both by Scoping Study, pilot searches and refined during the Review itself and are shown in Figure 4. In addition, where articles were identified as either Book Reviews or Duplicates, they were marked as such and discarded. Where texts were not available electronically (via SFX), they were marked 'unavailable' and inter-library loan requests were made in an attempt to source a paper-based copy. If a paper-based copy was available, the study was considered in the same way as the other studies, if not it remained marked as 'unavailable'.

Once these searches were completed and the Inclusion / Exclusion criteria applied in order to identify a set of relevant studies, a series of 'cross-referencing' activities were undertaken. Each of the references for each of the studies included from the initial searches was reviewed, and discrete searches undertaken for paper titles and authors felt to be of most relevance. It was only at this stage that Practitioner, as well as Academic, Papers were considered. The studies identified at this stage were again subjected to the Primary and Secondary Inclusion / Exclusion criteria to produce a further set of relevant

studies. Where studies were identified as Book Reviews or Duplicates, they were marked as such and discarded. At this stage, if studies were not available electronically (via SFX), they were not considered, and no further attempt was made to source a paper-based copy.

Studies considered at Scoping Study stage were also reviewed for Inclusion and, if still felt to be relevant to this Review were included.

Criteria	Inclusion	Exclusion
1A	Corporate or government sector	Voluntary or not-for-profit sector (rationale: cultural differences within the organisation e.g. purpose, motivation, governance models, volunteer vs. employee etc).
1B	Organisational Politics / Organisational Democracy	Socio-Political or Socio-Economic models (Rationale: test searches yield some papers related to P olitics; these are out of scope for this review).
1C	English	Non-English (Rationale: to control out cultural differences for studies not undertaken in English-speaking geographies).
2A	Organisational Democracy models that facilitate meaningful conversation between leaders and workers	Other Organisational Democracy models that operate within a 'closed' group and do not bridge the divide between leaders and workers (e.g. a local workgroup), or which do not provide a voice for workers (e.g. shared ownership schemes that simply divide reward / investment).
2B	May be conceptual or theoretical, but must have implication for practice, e.g. recognising / discussing the tensions and challenges of implementing Organisational Democracy in an organisational context	Abstract concepts or theories that are incognisant of application within the organisational context.
2C	Considers the impact of Organisational Politics, Power, Control etc. in relation to Organisational Democracy	Considers the impact of Organisational Politics, Power, Control etc. in relation to other issues, e.g. morale or employee satisfaction or performance
2D	Internal use of the technology, e.g. to connect leaders and workers	External use of the technology, e.g. to connect businesses and their customers.
2E	Considers the management and leadership considerations, consequences and outcomes of technology implementation / adoption, e.g. engagement with the technology.	Focuses on the technical considerations, consequences and outcomes of technology implementation / adoption, e.g. selection criteria or TAM assessment.
2F	Considers how economic decisions are made within organisations.	Financial or economic analysis of Labour-managed firms, or worker co-operatives, for example lending, pricing, utilisation, productivity etc.
2G	Considers empowerment in relation to organisational democracy.	Considers empowerment in other contexts, e.g. coaching, or during change.

Figure 4 - Primary and Secondary Inclusion and Exclusion Criteria

Finally, and through discussion with the supervisory panel, select conference proceedings were reviewed for papers relevant to the study. Two conferences were identified – The 16th European Conference on Information Systems 2008, and The Academy of Management 2008 Annual Meeting Proceedings and again, any papers identified were subjected to the Primary and Secondary Inclusion and Exclusion criteria. As a general principle, only working papers, conference papers and non-academic texts, published within the last 3 years would be considered for inclusion.

For each included study a quality appraisal was undertaken, and Figure 5 summarises the evaluation criteria against which a narrative was provided. The Journal Rating was based upon Cranfield School of Management Guidance (Kirchner, 2006).

QUALITY ASSESSMENT CRITERIA	
1.	Consider journal rating, and number, nature, range of references.
2.	Was an explicit account of the theoretical framework given? (consider depth of review / synthesis of earlier work, related concepts or fields, e.g. literature review)
3.	Is there a succinct statement of objectives or research questions? (consider extent to which the review/research questions are clearly/explicitly articulated)
4.	Is there a clear description of the context? (consider intervention, outcome, barriers and if/how overcome)
	Is the method both well defined and well designed? (consider the depth of definition, and supporting justification, assumptions and limitations) How was the sample chosen, was it adequate Is there a clear description of data collection and data analysis methods; are they appropriate, is there transparency
5.	How does the research move from raw data (numbers, quotations, examples) to an analysis and interpretation of the meaning and significance of the findings? (consider clarity and transparency of findings, strength of warrant, coherent and consistency of approach that addresses stated aims).
6.	For conceptual models, is an explicit model described, linked to earlier work, related to the organisational context and discussed extensively?
7.	How significant are the findings, what is their contribution, and their general relevance to practice; is there guidance for future research? (consider degree of abstraction vs. generalisability)

Figure 5 - Quality Assessment Criteria

Stage 3 – Extracting and synthesising data

For each of the studies selected for Inclusion, a Data Extraction and Synthesis Template (developed and agreed as part of the Review Protocol) was completed.

This template includes citation information, descriptive information, methodological information, thematic information, and key findings as well as the inclusion/ exclusion criteria and the quality assessment criteria referenced earlier. An abstract of each paper was also produced (as opposed to the original author-provided abstract) and included, and in order to aid synthesis, both the Wallace and Wray Critical Analysis Framework (Wallace and Wray, 2006) was included as were sections prompting an assessment against each of the Review Questions. The full Template is shown in Appendix A.

Stage 4/5 – Reporting and Utilising the findings

This paper will report and discuss findings, and suggest suitable Research Questions and Outline for the Empirical Research Project as a mechanism to utilise the findings.

In parallel to undertaking this review, a small pilot study was undertaken. This study inquired into practitioner (worker) perspectives regarding Enterprise2.0. Where relevant, findings from this study will be referenced within the review, as will relevant practitioner literature.

Overall Yield

Figure 6 briefly summarises the initial yield and net (post inclusion / exclusion assessment) totals for each stage of the process.

	Search Strings	Cross-Referencing	Scoping Study	Conference Proceedings	Grand Total:
Initial Yield:	390	251	39	2	682
Net Yield:	63	14	7	0	84
% of total:	75%	17%	8%	0%	100%

Figure 6 - Gross and Net Yield by Stage

A full log was kept of all decisions, actions, and observations throughout the Systematic Review which includes a more detailed breakdown of the reasons for inclusion and exclusion at various stages. This is available, upon request.

2. REVIEW QUESTIONS

As part of the prior Scoping Study, the relevant fields were identified, and assessed, resulting in the following Systematic Review Questions:

- What different perspectives and models exist with respect to Organisational Democracy? [RQ1A] What interventions (technological, procedural, systematic etc.) can be initiated to enhance Organisational Democracy? [RQ1B]
- What are the general factors that affect Organisational Democracy? [RQ2]
- What tensions are observed between the desire of the leader to embrace Organisational Democracy whilst maintaining a need to retain power or exert control? [RQ3]
- What are the theoretical frameworks and methodological approaches employed within this field? [RQ4]
- What is the relationship between Enterprise2.0 and Organisational Democracy? [RQ5]

The findings for each of these questions will be addressed in this paper.

3. DESCRIPTIVE DATA

This section will be used to describe the overall literature base, incorporating a descriptive analysis of all studies included in the Review. In addition, it will address the Review Question [RQ4].

Upon completion of the Method outlined in Chapter 1, 84 studies were identified as relevant for inclusion. Figure 7 shows the breakdown by Search String and Stage. As outlined in Chapter 1, each Search String is represented by an abbreviation. For reference, a summary description is also shown below; for a more detailed definition please refer to the *Identifying and Evaluating Studies* section in Chapter 1.

OD-LWR: Organisational Democracy and Leader-Worker Relations
T-LWR: Technology and Leader-Worker Relations
T-OD: Technology and Organisational Democracy

	Search Strings	Cross-Referencing (*)	Scoping Study (*)	Conference Proceedings	Grand Total:	% of Total:
OD-LWR	50	11	6	0	67	80%
T-LWR	11	3	1	0	15	18%
T-OD	2	0	0	0	2	2%
Totals:	63	14	7	0	84	100%

(*) Studies Mapped to most appropriate Search String

Figure 7 - Gross Yields by Search String and Stage

The descriptive analysis shown in Figure 7 is informative, since it shows the relative size of the relevant fields as they relate to this study. It highlights that the bulk of the literature in scope for this study (OD-LWR) does not directly address Enterprise2.0 or related technologies. The search that might be considered as closest to the aim of this study (T-OD) yielded only 2 studies and this would support the findings from Scoping Study that this is a largely un-researched field. Other reasons for the low yield may be that this area is not seen as relevant by Scholars; it may be that this is an emergent area, or it may be that the Search Strings were incomplete. When coupled with other, more mature fields, these searches did yield greater results suggesting that Search String integrity is not in question. Also, the use of the simplified Keyword searches in Psycinfo did yield significant results revealing an active discussion regarding the use of this technology in Academic, Library and Medical environments. Whilst there is apparently little Scholarly work in the area of Enterprise2.0 and its relationship with Organisational Democracy, it has been found through earlier searches that this area is a key topic of conversation within the Practitioner literature, perhaps suggesting that whilst Academic literature is discussing the role of Enterprise2.0 in certain domains, practice is ahead of Academic study when assessing the role of Enterprise2.0 as a suitable intervention to democratise the organisation and in connecting leaders and workers.

The second descriptive analysis that is reported here shows the domains from which relevant studies are sourced from, and tracks the longitudinal publication dates for each study for each of the domains. This analysis is shown in Figure 8. The Journal in which each contributing study was published is categorised according to Cranfield School of Management guidelines (Kirchner, 2006). Where a Journal is not classified, this is shown. Additionally, Practitioner Papers (introduced at the cross-referencing stage) are also shown.

	Economics & Decision Science	HR Management & OB	Strategic Management & International Business	Not Categorised	Practitioner Paper	Total:
Not Known		1;	1;	1;		3;
1950 - 1959		1;				1;
1960 - 1969		1;		1;		2;
1970 - 1979		4;	2;	1;		7;
1980 - 1989		2;	6;	2;		10;
1990 - 1999	2;1	5;	6;2;	11;1		24;2;2
2000 - 2008		2;1;	11;1;	7;8;	3	20;13;
Total:	2;1	16;1;	26;3;	23;8;1	3	67;15;2

Key: **OD-LWR**;T-LWR;T-OD

Figure 8 - Journal Categorisation and Longitudinal Publication Date Summary

A number of observations can be made from this descriptive analysis and these are briefly discussed here. Although one study has been identified as far back as the 1950's, it appears that studies relating to the OD-LWR search string have become much more prominent through the 1980's, and 1990's and that this prominence appears to be continuing. The largest yield for this search was identified in Journals categorised as Strategic Management and International Business. Whilst the number of studies was more stable, there is also interest in this area in the HRM & OB domain. Secondly, the Technology-related searches only yielded results from the 1990's onwards, with a marked increase from 2000-onwards. To extend understanding in this area, it appears that further recourse to practitioner literature may be required.

The third descriptive analysis undertaken is to provide an indication of quality of included studies. This is summarised here through use of the Cranfield School of Management guidelines (Kirchner, 2006). These guidelines provide a rating for each journal publication, using the following quality scale: 4* = world leading, 3* = top international, 2* = lower international, 1* = national. The findings from this descriptive analysis of studies included in this review are shown in Figure 9.

	Unknown	Unrated	1*	2*	3*	4*	Practitioner	Total:
OD-LWR	1	22	4	10	7	23	0	67
T-LWR	0	8	0	0	1	3	3	15
T-OD	0	1	0	0	1	0	0	2
Total:	1	31	4	10	9	26	3	84

Figure 9 - Quality Assessment and Journal Rating

This analysis shows that overall, 62% of the included studies are from rated journals and that 42% of the included studies are from 3* and 4* journals.

Within the T-LWR domain, as discussed earlier, some of the included studies are Practitioner papers included from the cross-referencing activity. In addition, it should also be noted that many of the papers in this search shown as originating from unrated journals were associated with Communications and PR, which is not a domain that is listed as part of the Cranfield School of Management Journal Rating guidelines, and hence, would by default, be shown as unrated.

The final descriptive analysis undertaken will address the Review Question [RQ4].

What are the theoretical frameworks and methodological approaches employed within this field? [RQ4]

Figure 10 shows which methodological approaches are used (and to what extent) across the included studies. Where multiple methodological approaches are used within the same paper, only the primary method is recorded.

	N/a	Conceptual	Case Study	Literature Review	Action Research	Quantitative	Qualitative	Total:
OD-LWR	3	13	29	3	16	2	1	67
T-LWR	0	0	2	1	5	7	0	15
T-OD	0	0	1	0	0	1	0	2
Total:	3	13	32	4	21	10	1	84

Figure 10 - Methodological Approaches

Figure 10 shows that the most commonly used method for the fields of interest in this study is the Case Study approach. Although 38% of included studies adopted this approach, it should be noted that oftentimes, these Case Studies take the form of vignettes, and that only a handful of extended Case Studies have been identified during the review.

Finding 1: Case Study is the most commonly used method in this field, although only a few are extensive.

Figure 11 shows which theoretical frameworks are employed (and to what extent) across the included studies.

	Power Theory	Organisational Democracy	Leadership Theory	HRM	Organisational Theory	Technology	Other
OD-LWR	9	28	17	10	9	0	13
T-LWR	0	0	0	4	0	6	9
T-OD	0	0	0	0	0	2	3

Figure 11 - Theoretical Frameworks utilised by included studies

These results merit a brief discussion. Within the studies included from the OD-LWR search, the role of the leader is discussed extensively, along with leadership style. Also, studies included from this search discuss power and control, in some cases using approaches such as the Control Graph Theory to assess the impact and consequences. HR Management (such as Employee Involvement, 360-degree feedback programmes) is also discussed, as are Organisational Theories (such as the Likert Organisational Profile). As expected, theories of Organisational Democracy are discussed most extensively in the studies identified through this search, confirming Search String integrity.

For the technology-related searches (T-LWR, T-OD), there is a natural bias to technology-related concepts, and whilst HR Management theories (Employee Involvement, Employee Engagement and Employee Communications) are also discussed, none of the Technology-biased studies include any theories of Organisational Democracy.

4. PURPOSE, DEFINITION AND RATIONALE

This Chapter will outline the business problem that is under investigation, provide a definition for Enterprise2.0, and describe the rationale this review. Specifically, the discussions within practitioner literature on Enterprise2.0 will be summarised and the links to academic literature on Organisational Democracy will be introduced. Much of the practitioner literature referenced in this Chapter was identified at an earlier stage of the Research project, rather than through the systematic review process described in Chapter 1. Practitioner literature identified through the systematic review process is described later in the text.

The Problem under investigation

Within organisations, the relationship between leaders and their people often feels distant. People feel disconnected from the leadership and the organisation feels closed rather than open. Organisations can suffer when conversations that may have been better held internally fail to happen, and are then voiced – very publicly – by an employee frustrated that they had no internal channel through which they may be heard, or who feels that it was not safe to speak up. As corporations increasingly move towards knowledge-based work, it is also seen as important to connect leaders and workers to create a rich and informed dialogue. Corporate organisations are therefore experimenting with Enterprise2.0 as a means to engage leaders and workers in meaningful conversation, to both benefit from the resultant network effect, and to address the perceived disconnect.

Definition – Enterprise2.0

Despite the practitioner focus on Enterprise2.0, its definition remains elusive. Its heritage lies in the earlier consumer phenomena Web2.0. The phrase Web2.0 was coined in 2004 at an O'Reilly media conference to describe the next generation of the internet. It has been variously described as 'the ability to share and connect with other users' (Walmsley, 2006), the 'participatory web' (Schott, 2008), 'social media' (BTpedia contributors, 2007), 'the architecture of participation...harnessing collective intelligence' (O'Reilly, 2005), as the 'writable web' and 'a decent vehicle for capturing or pointing to knowledge – perhaps offering a way to realise the...unfulfilled, promise of knowledge management systems' (Hodgkinson, 2007a). According to some, Web2.0 has replaced 'the authoritative heft of traditional institutions with the surging wisdom of crowds' (Schott, 2007). In general then, the label Web2.0 is used to collectively describe a 'new wave' of self-service, web-based tools that simplify user interfaces and interactions, and encourage communication, contribution, collaboration, participation and Social Networking.

The term 'Enterprise2.0' first appeared in an MIT Sloan Management Review article and was used to define 'those platforms that companies can (use) to make visible the practices and outputs of their knowledge workers' (McAfee, 2006). Today the term is becoming increasingly prominent in practitioner literature, and is used to describe any internal business adoption of Web2.0-like applications or concepts. As with Web2.0, Enterprise2.0 places great emphasis on social interactions and collaborative goals and, in common with Web2.0 is also sometimes referred to as 'social media', which Gregory (2007) describes as 'the online technologies and practices that people use to share opinions, insights, experiences and perspectives with each other'. Examples of such interventions include the introduction of the blog in Sun Microsystems as a vehicle to engage employees, customers, partners, analysts and others in product discussions – here "blogging has become an essential business tool" (Gordon, 2006), Oracle

Connect, a social networking tool that allows employees to create profiles and be rated by their colleagues using 'kudos' points (Bradshaw, 2007), the creation of Innocentive by Eli Lilly to provide an eBay-style interface to connect R&D departments of large firms to a global network of innovators (Tapscott and Williams, 2007), the establishment of Linkpedia, an internal version of Wikipedia, created by Linklaters to allow employees to organise and share knowledge (The Lawyer Contributors, 2007), a virtual Second Life pavilion, created by AMD where current and previous employees can meet, network, attend lectures and training courses or visit the exhibition hall (Libert and Spector, 2008), the British National Physical Laboratory-sponsored creation of an avatar-based 'Nanotechnology Island' to facilitate scientific discussions and meetings (Humphrys, 2008), the creation of the executive blog, FastLane, at General Motors (Economist Intelligence Unit, 2007) and examples where firms such as Royal Bank of Scotland, KPMG, and Wells Fargo have held recruitment fairs on Second Life (Parry, 2008; Hoover, 2007).

Rationale and Purpose of the Review

Whilst practitioners herald Enterprise2.0 with great promise, they also perceive that significant questions must be asked by organisations regarding this intervention. In terms of the promise of Enterprise2.0, practitioners see the tools as transformational in nature, and the benefits that are anticipated resonate with the language of the Organisational Democracy literature. Practitioner descriptions of the benefits of Enterprise2.0 variously include 'adaptation of workgroup structures' and 'collaborative teaming' (Raskino, 2007), 'self-organising' (Tapscott and Williams, 2007), 'community participation' (Bradley, 2007), the ability to 'react more quickly to emerging situations by quickly assembling the expertise required to respond' (Bradley, 2007), and to make a significant impact on the way employees interact with the company and to cut costs, increase margin and drive revenue (Economist Intelligence Unit, 2007). Gartner (Gartner, 2007) see Enterprise2.0 interventions as a key component of a high-performance workplace strategy, which it describes as 'designed to make workers as effective as possible in supporting business goals and providing value...continually balancing investments in people, processes, physical environments and technology to measurably enhance workers' ability to learn, discover, innovate, collaborate and lead - and to achieve efficiency and financial benefits'.

The potential problems practitioners anticipate with the introduction of Enterprise2.0 technology however perhaps link it even more strongly to the literature on Organisational Democracy, where the tensions created by the conflicting desires of leaders to introduce Organisational Democracy, whilst at the same time feeling the need to retain Power and Control are repeatedly highlighted. In discussing the potential problems of introducing Enterprise2.0, Hodgkinson (2007a, 2007b) suggests organisations must ask themselves whether they are truly ready to collaborate, create and exploit knowledge; whether existing social interactions are open or closed and highlighting that such interventions will mean an inevitable loss of control in an enterprise environment. He highlights the fact that the cultural aspects of organisations - particularly those regarding hierarchy, power and politics will be challenged by the peerless, self-managing communities encouraged by Enterprise2.0 and he also questions whether organisations have the critical mass of users that can spark and subsequently sustain interaction, suggesting that not everyone will be prepared, or able, to participate - a key factor in creating a truly collaborative environment. Tapscott and Williams (2007) also recognise that such interventions - with their associated sense of openness, democratisation and the ceding of control to the organisation at large, all present challenges to the established cultural and

leadership norms, asking whether the minds of leaders are truly 'wired for Wikinomics'. Mitchell (2007) believes the change must be managed using different approaches and that only through addressing the psychological and social aspects, will organisations be truly able to unlock the benefits of community and collaboration. In order to address the more prominent cultural aspects, Hodgkinson (2007a, 2007b) suggests leaders will need to provide a facilitative and moderating environment to secure success, suggesting leaders must 'let go' of their traditional tight controls, and work to foster collaborative use of the new platforms. He uses the metaphor of the 'gardener' to explain how leaders will need to tame, landscape, cultivate and tend the adoption of such technologies within the enterprise, and this is mirrored by McAfee (2006) who suggests leaders must first encourage and stimulate use, then refrain from intervening too often or with too heavy a hand, suggesting that if leaders are too lightly engaged at first or too heavily controlling later on, then the promise of Enterprise 2.0 will fail to be realised. Raskino (2007) cautions that 'the benefits of Enterprise 2.0 will come only from considerable change to existing sources of power, authority and control' and even in his original paper, McAfee (2006) recognised the 'delicate' role that leaders will have to play in the success or otherwise of Enterprise2.0 interventions, observing that because of the challenges such interventions present, there will be 'significant differences in companies' abilities to exploit them' and that 'because of the opportunities the technologies bring, these differences will matter a great deal'. McAfee hypothesises that whilst managers may voice support, they may seek to instigate controls, relating this to the way in which corporate empowerment initiatives are often seen to fail or disappoint. He questions whether managers will silence dissent, asks how they will feel about the apparent loss of control and asks whether managers and leaders will exert pressure (subtle or not) to close down the online content. One of the key informants in McAfee's study is cited as saying "I'm not sure wikis would work in a company that didn't already have 360-degree performance reviews."

Whilst this section highlights the congruent, but parallel discussions within the practitioner literature regarding Enterprise2.0 and the academic literature regarding Organisational Democracy, there is very little knowledge as to whether or how Enterprise2.0 may enhance Organisational Democracy or what actual (rather than anticipated) challenges may exist, and how these compare with problems observed in other models of Organisational Democracy. The purpose of this review therefore is to look at the relationship between Enterprise2.0 and Organisational Democracy in more detail, to identify what is known and not known, and to inform a later empirical research project into the role of Enterprise2.0 as a possible contemporary instantiation of Organisational Democracy, specifically in respect to enabling meaningful conversation between leaders and workers. The links between the practitioner literature on Enterprise2.0 and academic literature on Organisational Democracy will be discussed further within and throughout this text.

5. MODELS OF ORGANISATIONAL DEMOCRACY

This section will provide an overview of the models of Organisational Democracy identified, and position this in the wider context. It will address the Review Questions [RQ1A] and [RQ1B]. It will also briefly introduce the concept of Organisational Democracy.

Organisational Democracy is a large field that embraces self-managing teams, autonomous workgroups, shared and distributed leadership models, communities of practice, concepts of a 'circular organisation', 360-degree feedback models,

quality circles, worker co-operatives, labour-managed firms, models of worker representation and concepts such as socio-technical systems theory, whereby human behaviour and technology is inter-related and can affect one another, and de-differentiation, where everyone, not just management is responsible for integration and co-ordination (Hatch and Cunliffe, 2006; Ackoff, 1989). Devolving decisions to the right person in the organisation is seen as key to ensuring worker satisfaction and as well as key to driving efficiency across the organisation. The concept of Organisational Democracy, however, goes beyond simply devolving decision-making authority and seeks to embed truly democratic processes across the organisation mirroring the way society operates more widely. As well as models that may exist purely within an organisational context, the literature also considers co-operative approaches that extend beyond the enterprise and that include elements of wider social integration.

What Different Perspectives and Models Exist with respect to Organisational Democracy? [RQ1A]

Two striking perspectives are apparent when assessing the literature on Organisational Democracy. The first regards its span, both in terms of its existence in a historical perspective and in terms of global application (i.e. across both time and space), and the second the highly entwined relationship with the wider socio-economic and socio-political context. With respect to the first point, Derber (1966) for example cites North American examples that go back as far as 1867 that include profit-sharing, employee representation and collective bargaining, Hennen (2001) documents the example of Weirton Steel in the 1930's which promoted company loyalty and worker productivity by providing employees with voice and participation in company affairs, and Clarke (1987) identifies interventions in Great Britain that also go back to the 1800's, such as self-governing workshops and the creation of guilds, or industrial councils of producers, and later worker representation through unions. Upon analysis, it is also striking that the tensions discussed today with respect to models of Organisational Democracy (see Chapter 6) also existed then, and these studies, therefore are as relevant today as they were at the time. In terms of global application, a number of interventions exist, including the Mondragon co-operative model in Spain which combines an industrial co-operative with a range of co-operative banking, educational, consumer, housing and schooling systems, the social ownership models observed in Yugoslavia whereby the state has supported the development of industrial firms governed by co-operative principles (Whyte and Blasi, 1982), and the Israeli Kibbutz that combines work, community and social welfare (Rosenstein, Ofek, and Harel, 1987; Whyte and Blasi, 1982). Whilst these models, and others such as those identified in Algeria and India (Strauss and Rosenstein, 1970) are of interest and in some cases heavily referenced, it is not felt that they will inform this study as they describe a complex socio-economic and socio-political intervention that extends far beyond the enterprise itself, and may be considered as unique to the region or culture in which they exist. Other models however, such as the participatory Japanese Management System, or Theory Z (Mills, 1995; Ouchi, 1982) which includes conceptions of lifelong employment, non-specialised career paths, collective decision-making and holistic concern, the Semco interventions in Brazil (Semler, 1989) which describe a holistic approach to employee involvement, autonomous working, participatory decision-making and profit-sharing are seen as more relevant. In mainland Europe, studies are concerned with the legislative frameworks, such as German co-determination (Windmuller, 1953; Bartolke, Eschweiler, Flechsenberger and Tennenbaum, 1982), and the European Union legislation on Works Councils (de Jong and van Witteloostuijn, 2004; Thorsrud and Emery, 1969) which enshrine sometimes extensive consultative and representative rights in law, and which may variously include financial, social and

technological decision-making, the right to meet with management and have access to information, the right to be consulted on organisational changes such as downsizing and the right to veto operational matters such as terms, recruitment, promotion and training. These models are again seen as relevant, since they address in different ways and from different perspectives, those models of Organisational Democracy that are observed within the context of the enterprise organisation, and they may result in the development of meaningful conversations between leaders and workers or may generate tension between leaders, workers and their representatives. In the USA, there is much discussion as to the role of unions and collective bargaining within an overall context of Industrial Democracy (Derber, 1966, 1967; Hennen, 2001; McHugh, Cutcher-Gershenfeld and Polzin, 1999) and this is reflected in British studies (Clarke, 1987) which are also often highly political pieces (Wellens, 1974, 1983; Jaques, 1985). Again, these studies may be considered as relevant.

Finding 2: Organisational Democracy is not new – examples have been identified back to the 19th Century.

Finding 3: Interventions have been identified and researched globally, however some extend far beyond the enterprise organisation, and these are not felt to contribute to this study.

This short summary highlights the span, across both time and space, which has been identified as part of the review and also the highly intertwined relationship between the drive to Organisational Democracy and the wider socio-economic and social-political context. The ideological relationship between the wider democratic principles pervading society and the drive to Organisational Democracy are explicitly discussed by Bluestone (1977) who sees this as a positive development, by Pateman (1975) in her contribution to the political theory of Organisational Democracy, and by Strauss and Rosenstein (1970) in their critique of worker participation theory. Whilst political ideology is seen as a driving force, Pateman, Strauss and Rosenstein and others (Kerr, 2004) question whether this model is flawed. For example, Pateman believes that more direct forms of democracy (as opposed to representative forms) are needed in order to avoid disillusionment from employees and citizens, Strauss and Rosenstein argue that much of the drive for Organisational Democracy has come from intellectuals, propagandists and politicians, rather than rank-and-file workers and Kerr fundamentally questions whether political democracy is appropriate for organisations, highlighting that hierarchy and appointment within the organisational construct is very different to the principles of democratic election and equal rights that pervade wider political democracy constructs. Others, however, call for organisations to look back to earlier stages of human development for suitable models of operation, for example, the Athenian model that aligned civic duty and decision-making rights (Manville and Ober, 2003; Russell, Hochner and Perry, 1979) or to adopt the social-principles of our hunter-gatherer past (Ehin, 1995a) to discover meaningful ways to manage complex organisations 'more congruent with human nature'. Beyond ideology, it is also worth noting that changes in the socio-economic and socio-political environment can create greater appetite for Organisational Democracy. Derber (1967) for example, highlights the appetite for worker- and union-friendly legislation observed immediately following the Great Depression in the USA and Strauss and Rosenstein stress the obvious appetite for all-pervading democracy across Germany and Europe immediately after World War II, in India and more recently in Eastern European states such as Yugoslavia and Poland as they undergo fundamental shifts in the nature of their politics and political aspirations.

Finding 4: The drive to Organisational Democracy is often driven by the significant external forces, such as macro-level socio-economic or socio-political events.

Finally, discussions centre on the success or otherwise of Organisational Democracy. Whilst, some suggest that the interventions seen in the Kibbutz, Mondragon and the Yugoslavian model can only exist in the set of political, economic and social circumstances that created them (Strauss and Rosenstein, 1970), others (Semler, 1989) suggest such interventions should instead prompt thought and discussion on what may be appropriate interventions on a broader scale and to encourage organisations to experiment. Indeed a number of large-scale interventions are documented, including the Bremen Group which employs complex governance structures and equal decision rights between employees (de Jong and van Witteloostuijn, 2004), the Ford Motor Company who instigated a combination of steering committees and local teams to enhance involvement and participation (Denton, 1995), Suma Wholefoods which underwent a number of changes in approach in order to meet its aspiration to embed an appropriate model of participation and involvement (Jones, 2000), Delta Air Lines (Kaufman, 2003) whose intervention is described in more detail later, Weirton Steel (Hennen, 2001) which effectively created a company union, the US Navy (Powley, Fry, Barrett and Bright, 2004) whose intervention is described later and Semco (Semler, 1989) which is described above. Despite these examples, writers appear divided on the overall adoption or success of Organisational Democracy models and a number question why this may be – arguing that the concept of democracy goes against that of the rational organisation (Butcher and Clark, 2002), highlighting that if democracy leads to organisational success, then it would have been adopted more widely (Johnson, 2006), that the argument is fatally flawed since it is a concept incompatible with that of the organisation (Strauss and Rosenstein, 1970; Kerr, 2004) and that Managers deliberately disrupt or derail interventions (Brennan, 1991). Others also question whether it is democratic to give voice to employees at the expense of other stakeholders, such as the wider community, customers or suppliers (Johnson, 2006; Pateman, 1975) or indeed, other employees to which rights are not extended (Russell, Hochner and Perry, 1979) or are restricted to a minority elite (Johnson, 2006).

Finding 5: Although some documented cases appear un-generalisable, a few large-scale, apparently successful corporate interventions have also been identified.

Finding 6: Organisational Democracy is seen to succeed and fail in almost equal measure, some arguing that the concept is fatally flawed.

In considering the specific aim of this study, to consider Enterprise2.0 as a contemporary instantiation of Organisational Democracy and in particular in enabling meaningful conversations between leaders and workers, it is felt that the examples outlined earlier in this section, particularly those models such as the Mondragon, Yugoslavian and Israeli Kibbutz that extend the co-operative approach beyond the limits of the enterprise organisation and into wider socio-economic or socio-political models are not likely to be relevant to this study. However, it is felt that the other examples described may well provide a relevant contribution to the study, informing this research in terms of identifying those factors that might facilitate or impede success. In addition, the possible advantages in using Enterprise2.0 technology might be that it provides equal (rather than privileged) and direct (rather than representative) connections between leaders and workers, and hence it may address the concerns raised by Pateman, Brennan, Johnson and Russell, Hochner and Perry.

What Interventions (technological, procedural, systematic etc.) can be initiated to enhance Organisational Democracy? [RQ1B]

In general, there appear to be four faces of Organisational Democracy interventions as described in the studies included in this review; those interventions that overlay onto an existing hierarchical structure, those that create a 'parallel structure' (Lawler and Mohrman, 1987), those that introduce innovative HR Management or other Management-led Initiatives, and those that provide some form of economic incentive, such as a worker co-operative, or an Employee Stock Ownership Plan (the ESOP).

When considering those interventions that overlay onto the existing organisational hierarchy, a number of different terms are used to describe such interventions, but Kaufman's (2003) study of the mechanisms employed at Delta Airlines is informative. Delta's model of involvement and participation work on three levels – at board-level where employee representatives have taken part, for example, in decisions such as CEO selection, at divisional level, where operational, customer-service and employee related issues are addressed, and at a low level – for example addressing continuous improvement and local practices/conditions. Various, and in different instantiations, workers may advise, recommend, or decide, unions may or may not be present and legislation may or may not exist.

In terms of introducing 'parallel structures', Ackoff's (1989) conception of a 'Circular Organisation' is one example. This model overlays a model of collective authority onto an existing hierarchical structure by ensuring that everyone in a position of authority has a board that includes representation from sub-ordinates, their immediate supervisor and other interested parties. Lawler and Mohrman (1987) discuss the concept of the 'Quality Circle', an intervention that both benefits and suffers from the fact that it is a 'parallel structure'. Whilst it draws people from across the organisation to address specific issues, without disrupting existing structures, power is still ultimately retained by management. In her review, Brennan (1991) goes further suggesting that Managers use both overt and covert power to disrupt such interventions. Enterprise2.0 appears to be different to both of these models in so much as it provides an opportunity to make adhoc, rather than structured connections that cut across existing hierarchical or parallel structures. Once the intervention is established, anyone may use it at any time to connect with the leader and potentially engage in meaningful conversation. A number of issues might arise from this, the first being the lack of structured or regularised engagement and the consequences that might arise from this, and the second regarding the significant power shifts that this is likely to create. As highlighted in Chapter 4, Practitioners see the power shift as one of the most challenging aspects associated with the establishment of Enterprise2.0 interventions and indeed anticipate potential problems as a result. Although the practitioner literature is not clear on how Managers will actually respond when faced with such shifts or in what form the overt and/or covert use of power may be applied, the pilot study undertaken as part of this research has highlighted that Managers do indeed use both overt and covert Power to control the interventions, and so this is seen as a rich area for further enquiry.

Finding 7: Organisational Democracy interventions can be introduced at various organisational levels and with different remits.

HR and Management initiatives identified include the 360-degree feedback process whereby individuals receive feedback from peers and sub-ordinates as well as from their supervisor. Some (Bernadin and Beatty, 1987) argue that if

such an intervention is managed carefully, it may overcome the 'delusionary system' under which managers and sub-ordinates usually communicate, whilst others (Peiperl, 2001) argue that such interventions cause anxiety, consume enormous effort, could affect ratings, be used for political advantage or have other unintended consequences (Waldman, Atwater and Antonioni, 1998). Other Management-led initiatives identified in this study include Total Quality Management, which in their critique, Rothschild and Ollilainen (1999) highlight that whilst emphasising the employee's role, the interventions in fact re-enforce top-down power relations. Finally, the use of the Appreciative Inquiry Summit (Powley, Fry, Barrett and Bright, 2004) describes a unique intervention that temporarily suspends existing hierarchical structures that foster stronger unity, creating informal ties that facilitate sustaining participative approaches and that this can work even in traditionally hierarchical environments such as the US Navy.

Finding 8: Other interventions may also be considered as relevant to this study – Appreciative Inquiry Summits, TQM, 360-degree feedback programmes, quality circles etc.

When considering these findings in respect to Enterprise2.0, it is clear that the discussion regarding 360-degree feedback is highly relevant. By providing a more direct connection between leaders and workers, the opportunity would exist to short-circuit the 'delusionary system' described by Bernadin and Beatty, but as well as the potential to challenge the pervading culture of the organisation, this would again test Managers and Leaders in terms of their leadership style, as well as in terms of their response when 'off-message' contributions are made. Indeed in McAfee's original paper, one key informant felt that an environment that already supported 360-degree appraisal was a pre-requisite for adopting the new technology. Within an Enterprise2.0 intervention, contributions may be anonymous, or associated with an individual. These are largely policy choices, and it would be interesting to inquire as to what policies exist, and the rationale as part of the study. Removing the protection of anonymity may be a use of leadership power and control, which plays to the Foucauldian view that the introduction of surveillance techniques, leads to stronger self-surveillance and self-control that restricts the conversation at source. This would make for an interesting inquiry, since this was not a finding that was supported during the pilot study. As well as leadership issues, the use of Enterprise2.0 may also result in some of the outcomes described by Peiperl and Waldman, Atwater and Antonioni, for example that the interventions may be used for political advantage or might cause individual and organisational anxiety, again resulting in the creation of tension. Some evidence to support each of these views was found during the pilot study, again suggesting that phenomena traditionally associated with models of Organisational Democracy are also present within Enterprise2.0 interventions that attempt to connect leaders and workers.

Finally, ESOP and other ownership models provide an intervention that both provide voice for employees as well as a financial incentive to participate. Some (Semler, 1989) see these links as essential to underpin Organisational Democracy, whilst others (McHugh, Cutcher-Gershenfeld and Polzin, 1999) suggest that such schemes benefit the employer – since employees are less likely to 'strike against themselves'. Other models, such as the Scanlon Plan (Strauss and Rosenstein, 1970) that collectively reward improved productivity have also been identified. For the purposes of this study, these aspects are not felt to be relevant.

6. EMERGENT THEMES

This section will identify key themes emergent from the Literature and address the Review Questions [RQ2] and [RQ3].

What are the general factors that affect Organisational Democracy? [RQ2]

Certain factors affecting Organisational Democracy have already been outlined in Chapter 5, with particular respect to socio-economic, socio-political, cultural, legislative and ideological factors. Further factors were also identified as part of the review, and these will be outlined here.

Changes in the External Environment

A common set of reasons cited for the need to create a more democratic workplace, relate to changes in the external environment. Specifically, moving to complex, highly interdependent, technological work within a rapidly changing environment and a mobile workforce is seen as a key driver. Pearce and Barkus (2004) considers this in respect to North American Knowledge Work, and in the strongly contrasting environment of South American Manufacturing, Semler's (1989) perspective is remarkably congruent, highlighting that in complex production environments, workers are best-placed to make the decisions and that contemporary workers will be attracted by such models, that staff turnover will be lower, and that productivity will be higher as a result. Ehin (1995b) emphasises the benefit of adopting a more self-organising system that empowers the workforce and generates learning, using Starbucks as an exemplar, and Calmano (2004) suggests adoption of such models can create a significant competitive advantage. If the move to knowledge work is seen as a key driver for adoption of Organisational Democracy, the fact that Enterprise2.0 experiments have largely been seen in organisations that rely heavily on knowledge workers cannot be ignored. Almost all of the examples cited in Chapter 4 address knowledge work, whether it is in R&D, Service or Technology-based industries. Indeed McAfee's original definition explicitly references the ability of the intervention to allow companies to tap into the 'practices and outputs of their knowledge workers'.

Finding 9: Macro-level External Factors such as rapid technological change, knowledge work, political ideology, cultural aspects and legislation are seen as important drivers to more democratic organisations.

Organisational Crisis

Paradoxically, the role of the external environment in driving towards a more democratic workplace is also seen as one of the drivers for moving away from highly participative models of working. When organisations experience an extreme crisis, a number of examples are recorded where the participative style becomes highly autocratic. Muczyk and Reimann (1987) challenge the 'unbridled enthusiasm' with which participative leadership is embraced, highlighting that many other factors including systems and culture must be aligned for this to succeed, and this theme is developed by Muczyk and Steel (1998) in their study of the 'Turnaround Executive' where they argue that a more autocratic and directive style is needed in times of crisis and hardship. Even in interventions perceived to be successful, Organisational Democracy is seen to be slower, and more time-consuming (Kaufman, 2003) and requires extended and concerted effort (Thorsrud and Emery, 1970). It is anticipated that Enterprise2.0 will mirror

the findings on Organisational Democracy, in that it is likely to be slower, more time-consuming and require extended and concerted effort, and in fact the practitioner discussion in Chapter 4 re-affirms the latter point, particularly in respect to the role of the leader. Perhaps of more importance is the discussion regarding the significance of leadership style in determining the degree of democracy (or control) that may exist, again a point that is strongly paralleled in the practitioner literature on Enterprise2.0. With this in mind, it may be informative to assess the use of Enterprise2.0 in different organisations or business units, to assess how the success of the intervention may vary under different leadership styles or approaches.

Finding 10: The move to or away from Organisational Democracy is often triggered by an Organisation in crisis, although some interventions are triggered through culture or the ideological beliefs of Organisational Leaders.

What tensions are observed between the desire of the leader to embrace Organisational Democracy whilst maintaining a need to retain power or exert control? [RQ3]

As well as the discussion regarding [RQ2] above (relating to leadership style), another commonly cited theme in literature is the role of middle management and supervisors in a participative work system. Of interest also is the role of the unions which is also extensively discussed, and their role is seen as particularly complex. The positive involvement of all of these groups (where relevant to the specific context) is seen as necessary for successful and sustained implementation, and all appear to use power to retain control or block participative approaches and so are relevant for discussion here. Finally, the equally complex role of the employee and the employee representative will be discussed; this again is a repeated theme from literature. From these discussions, it will be possible to begin to draw conclusions with respect to the extent of any Organisational Democracy realised through the various interventions – is it truly democratic, representative, or simply a pseudo- or even a false-democracy. This discussion also causes one to wonder, ultimately, whose purpose is served.

Finding 11: Internal factors can determine the success or failure of such an initiative – the role of managers, employees and unions is key.

Middle-managers and Supervisors

Walton and Schlesinger (1979) discuss the role of supervisors in participative management environments, highlighting that supervisors often feel marginalised in such systems since the management boundaries become blurred and that this can often lead to resentment on their part. Brennan (1991) considers the role middle managers play with respect to Quality Circles, finding that middle management was the most common and universally cited reason for failure. Brennan describes this group as a 'frozen layer' that use overt and covert power to stall or derail proceeding, for example through restricting information or resources or through filibustering. Johnson (2006) cites other management controls that may be enacted, including the re-enforcement of social norms and hegemonic practices that re-enforce the existing culture and hierarchical structure and which entrusts power to them; managers may limit the boundaries of decision-making, or cumbersome and bureaucratic processes may be introduced. It is often argued that the underlying causes for these reactions is the perceived loss of managerial control, however, studies in the USA (Russell, Hochner and

Perry, 1979) using Control Graph Theory find that in practice, whilst participative work systems result in a more equal distribution of power, there is a greater overall total level of influence and so management authority has been neither weakened nor strengthened, a finding also made by Bartolke, Eschweiler, Fleschsenberger and Tennenbaum (1982) in their studies of participative firms in Germany. Some studies (Smith, 1978) find that in certain environments, employees prefer an autocratic, rather than democratic approach. Since Enterprise2.0 effectively bypasses middle management and supervisors, by allowing workers to converse directly with leaders, one might presume that the difficulties outlined here in terms of the 'frozen layer' may not apply. Whilst this may be true in terms of the original 'upward' connection, it is not clear how middle-mangers will react to this aspect of the Enterprise2.0 intervention, what impact this may have, or what the consequences may be. Findings from the pilot study suggest however that these hierarchies might be re-engaged 'downward', albeit it offline, should a workers contribution be seen to be inappropriate, although of course this may only occur in an environment where the protection of anonymity is removed. The perceived loss of managerial control in an Organisational Democracy model lies at the heart of the practitioner concerns regarding Enterprise2.0 who argue that these controls must be relaxed in order to assure successful adoption, and encouraging leaders to 'err on the side of too much liberty' (Bradley, 2007).

Finding 12: Leaders, Middle Managers and Supervisors are all seen as potential barriers, and leadership style is critically important.

Finding 13: Power and control are used, but literature suggests that an increase in worker power does not diminish power at other Organisational levels and that workers expect that their Management would retain certain powers.

Many studies conclude that in order to address the tensions experienced at the middle-management and supervisory level, training (Walton and Schlesinger, 1979; Whyte and Blasi, 1982; Denton, 1995) and adjustments to evaluation, measurement and reward systems (Walton and Schlesinger, 1979) are needed. Kerr (2004) also argues that full-scale adoption (or revolution) can help, whilst others (Lawler and Mohrman, 1987) suggest a staged approach. When considering Enterprise2.0, it would be informative to assess how the intervention was made and whether the intervention was made in conjunction with any wider changes such as those identified here.

Finding 14: Other actions should be considered when managing the move to more democratic systems. For example, education in democratic principles is seen as important, and this should be applied at all levels.

The Role of the Union

The role of the union is seen as complex. Historically, some firms were seen to be introducing interventions to give workers voice and representation as a deliberate tactic of union avoidance (Derber, 1967). One of the most extreme examples identified is that of E.T.Weir (Hennen, 2001), who in the 1930's created the Employee Representation Plan for Weirton Steel workers in order to provide an illusionary sense of employee participation through the creation of an impotent and falsely representative company union that resisted all calls from the workers to strike. More recently, Imperial Oil (Taras and Copping, 1999), successfully held unions in abeyance at one of its plants through the Joint Industrial Council which whilst giving employee voice, gave no power to the workforce. Taras and Kaufman (2006) observe that some employers emphasise their participative

approach when the threat of unionism looms, only to reign back when this threat has passed. Given the way in which some firms have apparently adopted democratic principles, but have been motivated not by the associated values, but as a vehicle to further their own agenda, it seems appropriate to consider whose purpose is ultimately served by an Enterprise2.0 intervention. Do leaders use this to serve their own purposes, to bypass union representation and do they act on, encourage, ignore or close down discussions, particularly where they challenge organisational norms. This aspect of the discussion is reflected in the practitioner literature discussed in Chapter 4 and other questions may be 'do workers have a meaningful voice in the discussion?' or 'do workers have a voice that has power?' when engaging leadership through Enterprise2.0 technology.

Unions themselves (Brown and Quarter, 1994) are suspicious of engaging in mechanisms that introduce alternative forms of worker representation and use influencing tactics to impede the intervention, although there are examples where democratic interventions can co-exist alongside unions (Semler, 1989; Bluestone, 1977) and that unions can positively enhance the intervention, making it more equitable (McHugh, Cutcher-Gershenfeld, and Polzin, 1999). It would be of interest to consider what role, if any, unions play in Enterprise2.0 interventions aimed at connecting leaders and workers, and how they view such interventions or the content that they create. Conclusions from the pilot study suggest that workers (as well as leaders) interests have to be served in order for the intervention to be successful, and that some form of network affiliation needs to exist in order for the Enterprise2.0 intervention to be successful. The unions may be well placed to address these needs and crucially, the unions would have an interest themselves in the conversations taking place between the workers and leaders and could themselves use this voice to secure more power. Certain Enterprise2.0 interventions identified during systematic review employ moderated sites, to ensure accuracy of information, ensure adherence to the rules and to present summary information to executives (van Harmelen, 2007; Xarchos and Charland, 2008). Whilst further challenging the leadership in terms of ceding control, this might be one possible role for the union to perform, and may be a role that would benefit all parties so long as it was not used to distort the communications in order to serve the self-interest of the unions themselves.

Finding 15: The role of the unions is complex, and further complicates the web of power and control relations, and associated discussion.

The Employee and the Employee Representative

With respect to employees, it is argued that not all employees will want (Jones, 2000; Kerr, 2004; Strauss and Rosenstein, 1970) or feel able to contribute (Jones, 2000; Kerr, 2004; Strauss and Rosenstein, 1970) in more participative environments. In a similar parallel to the discussion earlier with respect to the need for management training, it is also argued that training the wider workforce in democratic principles (Walton and Schlesinger, 1979; Pearce and Barkus, 2004) as well as wider management skills and business understanding are important (Semler, 1989), particularly for employees who become employee representatives (Kaufman, 2003). Open sharing of information is also seen as key (Calmano, 2004, Semler, 1989). The sense that not everyone will want or feel able to contribute is reflected in the discussion on practitioner literature outlined in Chapter 4 but in addition, it may also be helpful to understand whether conversations are sustained or whether they quickly fade away. The question as to whether Enterprise2.0 interventions are supported by training and familiarisation has been discussed previously. Finally, the technology could clearly be used not only to enhance conversation and dialogue and encourage participation, but also to share information more widely. Therefore, it may be

reasonable to inquire during the empirical research project as to what extent Enterprise2.0 is used for these purposes, for example whether the responses are more honest or more open, and how effective it is in going beyond that which might have applied previously within the organisation or business unit.

With respect to the Employee Representative, as well as the issues over ability or commitment discussed above, role confusion, role conflict and other factors (such as degree or limits of involvement) can impede these interventions. Strauss and Rosenstein (1970) discuss the risk of co-option of worker representatives and Hammer, Currall and Stern (1991) find that as well as the 'neutralisation' tactics deployed by managers, worker representatives struggle with their dual-role – seen by worker constituents as workforce advocates, whilst being seen by management as a channel for downward communication. Research by Thorsrud and Emery (1970) found that worker representatives often took the board (rather than the employee) view and Strauss and Rosenstein (1970) also argue that some works councils hardly function at all, and that discussion is one-way. With respect to Enterprise2.0, whilst it is anticipated that the direct nature of the communication would avoid the types of challenges faced by worker representatives, it will be important to understand to what degree there is a two-way discussion, whether and how the discussion is sustained and how leaders react to 'unwanted' or 'awkward' discussion or views that go against organisational norms. The pilot study suggested that leaders did take steps to 'close down' such conversations and all of these points have been actively discussed and anticipated in the wider practitioner literature. A summary of these discussions can be found in Chapter 4.

Finding 16: It is right to question whether true (direct), representative or pseudo-democracy is actually achieved and ultimately to consider whose purpose is served.

7. DISCUSSION

This section will specifically address the Review Question:

What is the relationship between Enterprise2.0 and Organisational Democracy? [RQ5]

Whilst a short discussion on findings from the practitioner literature is included in Chapter 4, this section will summarise findings from the literature identified as part of the systematic review.

As discussed in Chapter 4, McAfee (2006) is credited with conceiving the term Enterprise2.0. Beyond this study, however, there is apparently very little academic literature on this topic. Cross-referencing has however identified some further practitioner literature that is relevant for consideration here. For example, a report by consultants Watson Wyatt (Rudnik and Kouba, 2006) suggest that 'Enterprise2.0 behaviour' has seen a four-fold increase over a 3-year period, and suggests that this is without approval, guidance, training or central intervention. The paper suggests firms should cultivate these locally initiated interventions and facilitate its growth. Referencing the demographic profile of workers where younger workers expect to use the more collaborative, asynchronous and interactive technology that is available today, the paper suggests that future recruitment and retention will benefit. These drivers and outcomes tend to mirror writing in the field of Organisational Democracy and the paper suggests internal CEO blogging is to be encouraged as this allows employees to actively contribute, express opinions and ask questions. Harmelen (2007) discusses the approach taken by TNT to 'invite employees into the CEO's

virtual office' and recognises the importance of respecting the views that are offered as constructive dialogue and the need to reach out to disengaged employees.

Xarchos and Charland (2008) describe a series of interventions in Innovapost – developed as a direct response to poor results in employee engagement surveys, particularly in the area of senior management not sharing their thoughts on the strategic direction of the company. The interventions included a CEO blog, now the most popular content based intranet site, and an online employee consultation exercise aimed at jointly creating a future business plan – to which 55% of employees posted. Results were presented to the board, which had the final say. Using the technology in this way can clearly be seen as participatory and an attempt to introduce some form of Organisational Democracy.

In a 2006 practitioner survey, Treem highlights that 32% of responding organisations use blogs that are uniquely aimed at the internal audience and 64% of respondents track blogging by employees. However, although 99% of communicators were aware of blogs, less than 30% had ever read one, and less than 30% had ever posted. These findings were reflected in the pilot study which found that even though certain informants were responsible for the creation and operation of Enterprise2.0 interventions, they had not used the technology themselves. Treem also highlights the differences between different demographic groups and cites obstacles such as disconnected employees, the desire to control, and senior management resistance, with the latter points clearly mirroring the findings with respect to Organisational Democracy. The paper also positively emphasises that the new technology can give more control to the organisation, perhaps in a bid to encourage managers to buy-in.

In a more recent survey of communications executives, Gregory (2007) reports that 55% of the sample indicated they were already using blogs or planning to start in the next 12 months, with 71% citing 'improved employee engagement' and 47% citing 'creating a two-way dialogue with senior executives' as the drivers. Interestingly, whilst some saw risks, 70% have no policy regarding inappropriate posts, and only 26% knew how to monitor the contributions. In a parallel with Organisational Democracy literature, 23% of respondents cited gaining executive support as a key challenge. Smith (2007) also highlights the importance of engaging the leadership team, and exercising restraint with respect to control. As reported earlier, McAfee (2006) himself also suggests that adoption will depend greatly on the decisions made and actions taken by managers and that the culture must be receptive, and for example, where 360-degree reviews are the norm. McAfee also projects an image of the future where non-management views will be created, asking whether managers, whilst voicing support, may seek to instigate controls, silence dissent, and working to restrain, rather than lose control.

Finding 17: Very little academic literature exists wrt. the role of technology, and explicitly Enterprise2.0 in creating a more democratic organisation, although some practitioner literature has been identified through cross-referencing.

Finding 18: There is similarity in terms of the expected outcomes and potential barriers associated with traditional models of Organisational Democracy and the use of Enterprise2.0 when used to connect leaders and workers.

Finding 19: There appears to be a desire from leaders (in academic literature) and practitioners (in practitioner literature) to connect.

8. SUMMARY OF FINDINGS AND DISCUSSION

This section will summarise what is known and not known about: **(a) The disconnection between leaders and workers in organisations, and the perceived need to engage in meaningful conversations** and **(b) The tension created by the conflicting desires of leaders to introduce Organisational Democracy, whilst at the same time needing to retain Power and Control.**

Each of the findings, identified throughout the text will be summarised, and consideration given as to what this might mean for the ongoing Research. Please see Figure 12 for this analysis.

In general, it appears that there is a case to inquire as to the role of Enterprise2.0 as a contemporary model of Organisational Democracy. The espoused practitioner intent and use of the technology is similar to that cited for other models of Organisational Democracy and practitioners perceive similar organisational challenges.

In discussing the traditional challenges associated with the introduction of other models of Organisational Democracy, it appears that some aspects (such as the role of supervisor, and middle management) may not have the same impact in an Enterprise2.0 intervention, however practitioners do anticipate that leaders will have a crucial role to play in the success of Enterprise2.0 and fear that power and control may in fact be used to close off unwanted discussion, an observation also made in the academic literature on Organisational Democracy. This merits further research.

The findings from the literature review also inform subsequent study. As well as identifying the Case Study as the preferred method, a number of parameters have been identified that should be considered as part of the Empirical Research Project and incorporated into the full Research Design. This includes the structure of the study itself – unit of analysis, sample etc., the fact that certain data may be informative and relevant, for example to assess the culture or leadership style present in the organisation, and that some specific questions should be considered as part of the Qualitative aspect of the study.

Findings from the literature review suggest that such a study would contribute knowledge, since it is not known what role, if any, Enterprise2.0 may play as a modern model of Organisational Democracy and specifically in respect to enabling meaningful conversations between leaders and workers. Given the findings from the practitioner literature, it appears that this research would be timely and relevant to practice.

A Systematic Review of Enterprise2.0 and its relationship with Organisational Democracy

Issue 2 (Nov'08)

Findings:	Relevance to Ongoing Study:
Finding 1: Case Study is the most commonly used method in this field, although only a few are extensive.	The Research Design for the Empirical Research Project will be Case Study based.
Finding 2: Organisational Democracy is not new – examples have been identified back to the 19th Century.	To inquire as to whether Enterprise2.0 is a contemporary instantiation of Organisational Democracy.
Finding 3: Interventions have been identified and researched globally, however some extend far beyond the enterprise organisation, and these are not felt to contribute to this study.	The focus of this and future study will be on those interventions that exist within the bounds of the enterprise organisation.
Finding 4: The drive to Organisational Democracy is often driven by the significant external forces, such as macro-level socio-economic or socio-political events.	Not seen as relevant to this study.
Finding 5: Although some documented cases appear un-generalisable, a few large-scale, apparently successful corporate interventions have also been identified.	These studies will be used to inform the subsequent Research Design.
Finding 6: Organisational Democracy is seen to succeed and fail in almost equal measure, some arguing that the concept is fatally flawed.	The success or failure of an Enterprise2.0 intervention will need to be considered as part of the Empirical Research Project and associated Research Design.
Finding 7: Organisational Democracy interventions can be introduced at various organisational levels and with different remits.	The focus of the Research is those interventions that enable more meaningful conversations between leaders and workers.
Finding 8: Other interventions may also be considered as relevant to this study – Appreciative Inquiry Summits, TQM, 360-degree feedback programmes, quality circles etc.	The success of these interventions is in part seen as dependent upon the culture of the organisation. The Empirical Research Project and associated Research Design should consider this.
Finding 9: Macro-level External Factors such as rapid technological change, knowledge work, political ideology, cultural aspects and legislation are seen as important drivers to more democratic organisations.	The Case Study needs to be positioned within one of these fields.
Finding 10: The move to or away from Organisational Democracy is often triggered by an Organisation in crisis, although some interventions are triggered through culture or the ideological beliefs of Organisational Leaders.	This needs to be considered as part of the Case Study.
Finding 11: Internal factors can determine the success or failure of such an	The Empirical Research Project and associated Research

initiative – the role of managers, employees and unions is key.	Design need to inquire into each of these constituencies.
Finding 12: Leaders, Middle Managers and Supervisors are all seen as potential barriers, and leadership style is critically important.	See Finding 11 above. Also, the Case Study should consider the leadership style of the organisation under analysis.
Finding 13: Power and control are used, but literature suggests that an increase in worker power does not diminish power at other Organisational levels and that workers expect that their Management would retain certain powers.	The Empirical Research Project should seek to establish how power and control are used, by whom and in what ways.
Finding 14: Other actions should be considered when managing the move to more democratic systems. For example, education in democratic principles is seen as important, and this should be applied at all levels.	This should be considered as part of the Case Study.
Finding 15: The role of the unions is complex, and further complicates the web of power and control relations, and associated discussion.	The Empirical Research Project and associated Research Design should inquire into union perspectives and role.
Finding 16: It is right to question whether true (direct), representative or psuedo-democracy is actually achieved and ultimately to consider whose purpose is served.	This Empirical Research Project and associated Research Design should describe outcomes and ultimately seek to understand whose purpose is served.
Finding 17: Very little academic literature exists wrt. the role of technology, and explicitly Enterprise2.0 in creating a more democratic organisation, although some practitioner literature has been identified through cross-referencing.	It appears that Practice is ahead of Academic writing in this particular field and so practitioner literature should be considered further. Given that there is very little Academic literature on this subject, this Research would appear to make a valid contribution.
Finding 18: There is similarity in terms of the expected outcomes and potential barriers associated with traditional models of Organisational Democracy and the use of Enterprise2.0 when used to connect leaders and workers.	There is evidence that Enterprise2.0 may be considered as a contemporary instantiation of Organisational Democracy, and this is an area that is worthy of further Research.
Finding 19: There appears to be a desire from leaders (in academic literature) and practitioners (in practitioner literature) to connect.	This timing of this Research is appropriate.

Figure 12 – Table of Findings and relevance to ongoing study

9. CONCLUSION AND NEXT STEPS

This section will posit a proposed set of Research Questions based on the findings from the Systematic Literature Review and provide a short outline for the Empirical Research Project. In addition, it will articulate the next steps.

The draft Research Questions for the Empirical Research Project are:

- What organisational perspectives exist with respect to Enterprise2.0 and its use in democratising the organisation through enabling more meaningful conversations between leaders and workers?
- Can Enterprise2.0 be considered as a contemporary instantiation of Organisational Democracy, with respect to enabling meaningful conversations between leaders and workers?
- To what extent does Enterprise2.0 work as an effective mechanism to facilitate Organisational Democracy, with respect to enabling meaningful conversations between leaders and workers?
- Does Enterprise2.0 overcome the problems, barriers and tensions associated with other models of Organisational Democracy? If so, how and why is this?
- What additional problems, barriers or tensions are observed when introducing Enterprise2.0 as an intervention to democratise the organisation through enabling more meaningful conversations between leaders and workers? How are these manifested?
- Ultimately, whose purpose is served through the use of Enterprise2.0 in the context of creating more meaningful conversations between leaders and workers?

The outline for the Empirical Research Project is:

Purpose

To establish leadership perspectives with respect to the relationship between Enterprise2.0 and its role in democratising the organisation.

A working title for the Thesis is: Enterprise2.0: The New Organisational Democracy?

Questions / Objectives

To address the finalised Research Questions (see above for draft Research Questions).

Sample

Using a Case Study approach with the Organisational Unit as the unit of analysis.

Different classifications have been developed for enquiring into different perspectives.

- "A" – **advocate** of Enterprise2.0
- "B" – has a **vision** regarding for using Enterprise2.0
- "C" – has a **reason** to use Enterprise2.0
- "D" – **operates** Enterprise2.0 usage
- "E" – a **business leader**
- "E" – part of the **wider population**

- "H" – a union representative, has an **interest** in what is being said
- "I" – an external communications consultant, can provide an **external** perspective

Only Organisations where perspectives from each category can be secured will be included.

Method of Data Collection

Face-to-face interview.

Method of Data Analysis

Transcription and nVivo coding to establish a themed synthesis.

The next steps are therefore proposed as:

- Secure panel sign-off for the Systematic Review, including finalised Research Questions and Empirical Research Project Outline
- Retrospectively write to the extended panel with an outline of the specific Research interest and next steps, eliciting their views and seeking their interest in participating further
- Extend the search of practitioner literature, since it appears that in this particular field, practice may be ahead of academic writing
- Develop a detailed Research Design for the Empirical Research Project, building upon the outline included here, and taking account of the discussions emanating from the findings of this review

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APPENDIX A – DATA EXTRACTION AND SYNTHESIS TEMPLATE

Reading Summary

Title:	
Author(s):	
Journal:	
Date:	

Read:	
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Paper Abstract	[100 words]		
Country:	Sector:	Technology:	...
Method(s) / Approach:	Key Concepts / Theories / Ideas:		

INCLUSION / EXCLUSION CRITERIA				
Corp or Gov NFP / vol.		Org. Politics / Org. Dem vs. Socio-political / Socio-economic models		English Language

Organisational Democracy models that facilitate meaningful conversation between leaders and workers (INCLUDE) vs. Other Organisational Democracy models that operate within a 'closed' group and do not bridge the divide between leaders and workers (e.g. a local workgroup), or which do not provide a voice for workers (e.g. shared ownership schemes that simply divide reward / investment) (EXCLUDE).	
May be conceptual or theoretical, but must have implication for practice, e.g. recognising / discussing the tensions and challenges of implementing Organisational Democracy in an organisational context (INCLUDE) vs. Abstract concepts or theories that are incognisant of application within the organisational context. (EXCLUDE)	
Considers the impact of Organisational Politics, Power, Control etc. in relation to Organisational Democracy (INCLUDE) vs. Considers the impact of Organisational Politics, Power, Control etc. in relation to other issues, e.g. morale or employee satisfaction (EXCLUDE)	
Internal use of the technology, e.g. to connect leaders and workers (INCLUDE) vs. External use of the technology, e.g. to connect businesses and their customers (EXCLUDE)	
Considers the management and leadership considerations, consequences and outcomes of technology implementation / adoption, e.g. engagement with the technology (INCLUDE) vs. Focuses on the technical considerations, consequences and outcomes of technology implementation / adoption, e.g. selection criteria or TAM assessment (EXCLUDE)	
Considers how economic decisions are made within organisations (INCLUDE) vs. Financial or economic analysis of Labour-managed firms, or worker co-operatives, for example lending, pricing, utilisation, productivity etc. (EXCLUDE)	
Considers empowerment in relation to organisational democracy (INCLUDE) vs. Considers empowerment in other contexts, e.g. coaching, or during change. (EXCLUDE)	

QUALITY ASSESSMENT CRITERIA	
8. Consider journal rating, and number, nature, range of references.	
9. Was an explicit account of the theoretical framework given? (consider depth of review / synthesis of earlier work, related concepts or fields, e.g. literature review)	
10. Is there a succinct statement of objectives or research questions? (consider extent to which the review/research questions are clearly/explicitly articulated)	
11. Is there a clear description of the context? (consider intervention, outcome, barriers and if/how overcome)	
12. Is the method both well defined and well designed? (consider the depth of definition, and supporting justification, assumptions and limitations) <ul style="list-style-type: none"> b. How was the sample chosen, was it adequate c. Is there a clear description of data collection and data analysis methods; are they appropriate, is there transparency 	
13. How does the research move from raw data (numbers, quotations, examples) to an analysis and interpretation of the meaning and significance of the findings? (consider clarity and transparency of findings, strength of warrant, coherent and consistency of approach that addresses stated aims).	
14. For conceptual models, is an explicit model described, linked to earlier work, related to the organisational context and discussed extensively?	
15. How significant are the findings, what is their contribution, and their general relevance to practice; is there guidance for future research? (consider degree of abstraction vs. generalisability)	

A Systematic Review of Enterprise2.0 and its relationship with Organisational Democracy
Issue 2 (Nov'08)

Introduce the text - (A) Why am I reading this? (1) What review question am I asking of this literature?	
Reporting the content – (B) What are the authors trying to do in writing this? (2) What type of literature is this? (3) What kind of intellectual project is being undertaken?	[50-100 words]
Reporting the content – (C) What are the authors saying that is relevant to what I want to find out? (4) What is being claimed that is relevant to answering my review question?	[50–100 words]
Evaluating the Content – (D) How convincing is what the authors are saying? (5) How far is there backing for claims? (6) How adequate is any conceptual or theoretical orientation to back claims? (7) How far does any value stance adopted affect claims? (8) How far are claims supported or challenged by others work? (9) How far are claims consistent with my experience?	[100-200 words]
Drawing your conclusion – (E) In Conclusion, what can I make of this? (10) What is my overall evaluation of this literature in light of my review question?	[100-150 words]
What does this paper say about.. What different perspectives and models exist with respect to Organisational Democracy? What interventions (technological, procedural, systematic etc.) can be initiated to enhance Organisational Democracy?	
What does this paper say about.. What are the general factors that affect Organisational Democracy?	
What does this paper say about.. What tensions are observed between the desire of the leader to embrace Organisational Democracy whilst maintaining a need to retain power or exert control?	
From this paper, what can be determined regarding.. What are the theoretical frameworks and methodological approaches employed within this field?	
What does this paper say regarding.. What is the relationship between Enterprise2.0 and Organisational Democracy?	
In general, what is known and not known about: The disconnection between leaders and workers in organisations, and the perceived need to engage in meaningful conversations The tension created by the conflicting desires of leaders to introduce Organisational Democracy, whilst at the same time needing to retain Power and Control	
What themes are emerging that could be used during synthesis?	
Key Authors / References:	